# AGRICULTURE PROGRAMME MANAGEMENT INFORMATION SYSTEM (APMIS)
# User Manual
# January 2006

Notice of Copyright

This document may not be reproduced in whole or in part, in any form without prior permission of Africon Ltd.

*© Copyright Africon Ltd - 2011*

All Microsoft products mentioned are trademarks or registered trademarks of Microsoft Corporation. All other product names that are mentioned in this manual are trademarks, registered trademarks, or service marks of their respective owners.

Africon Engineering
PO Box 905
Pretoria
0001
(012) 427-2479
(012) 427-2558

or 043 721 0900 - Africon East London Office

# Table of Contents


**1 INTRODUCTION & BACKGROUND ..... 1**

1.1 Objectives and Functionality of the APMIS ..... 1

**2 TERMINOLOGY USED IN THIS MANUAL ..... 2**

2.1 The Web Browser ..... 2

2.2 Terminology used in the Programme Management Module ..... 3

**3 PROGRAMME MANAGEMENT ..... 6**

3.1 Opening the APMIS Home Page ..... 6

3.2 Logging into the System ..... 7

**PROJECTS ..... 8**

3.3 Viewing Projects ..... 8

3.3.1 Viewing all Projects ..... 8

3.3.2 Filtering Projects per Type ..... 8

3.3.3 Filtering Projects per Programme ..... 9

3.3.4 Filtering Projects per District ..... 9

3.4 Searching for a Project ..... 9

3.5 Adding a Project ..... 10

3.6 Adding Phases for a Project ..... 11

3.6.1 Adding Milestones for a Phase ..... 12

3.6.2 Editing Milestone information ..... 13

3.6.3 Viewing Phase Budget Information ..... 14

3.6.4 Viewing a list of Consultant and Contractor Certificates booked against Phase ..... 15

3.6.5 Adding Comments for a Phase ..... 16

3.6.6 Uploading Documents applicable to Phase ..... 17

3.7 Editing Phase information ..... 18

3.8 Locking Phase information ..... 19

3.8.1 Unlocking Phase information ..... 20

3.9 Adding a Budget for a Project ..... 20

3.9.1 Editing Budget Information ..... 22
3.10 Adding Cashflow Expenditure ..... 23
3.10.1 Adding an additional Month to Cashflow period ..... 25
3.11 Adding Service Providers for a Project ..... 26
3.11.1 Editing Service Provider details ..... 27
3.11.1.1 Editing details for a Service Provider Contact Person ..... 28
3.11.1.2 Removing a Service Provider from a Project ..... 29
3.12 Claims ..... 30
3.12.1 Viewing a Summary of Claims made by Contractors and Consultants ..... 30
3.12.2 Adding a Claim made by a Contractor or a Consultant ..... 30
3.12.2.1 Editing Claim Information ..... 33
3.12.2.2 Editing Financial Claim Information for a Contractor or Consultant 33
3.12.3 Requesting a Direct Payment for a Contractor or Consultant ..... 34
3.12.3.1 Editing Direct Payment Request Information ..... 35
3.12.4 Locking/unlocking Claim information for a Contractor or Consultant ..... 37
3.13 Project Personnel ..... 37
3.13.1 Adding Project Personnel ..... 37
3.13.2 Editing Project Personnel Details ..... 38
3.13.3 Editing Roles for Project Personnel ..... 39
3.13.4 Removing Project Personnel ..... 40
3.14 KPIs ..... 41
3.14.1 Adding KPI employment statistics for a Project ..... 41
3.14.2 Adding KPI training statistics for a Project ..... 42
3.14.3 Viewing KPI Details per project ..... 43
3.15 Editing Project Information ..... 44
3.15.1 Editing Category Data ..... 44
3.15.2 Editing General Information ..... 44
3.15.3 Updating Works Description ..... 45
3.15.4 Updating Project Status ..... 46
3.15.5 Updating Project Costs ..... 47
3.15.6 Updating Budget Status ..... 48
3.16 Locking Project Information ..... 49

3.16.1 Unlocking Project Information ..... 50
3.17 Personnel ..... 50
3.17.1 Editing Personnel details ..... 52
3.18 Changing Project State ..... 53
**SERVICE PROVIDERS ..... 55**
3.19 Viewing a list of Service Providers ..... 55
3.20 Adding a Service Provider ..... 55
3.20.1 Rating a Service Provider ..... 56
3.20.2 Editing Service Provider information ..... 57
3.20.2.1 Adding a Contact Person for a Service Provider ..... 57
3.20.2.2 Editing Service Provider Contact Person details ..... 58
3.21 Viewing Unpaid Certificates for Consultants and Contractors ..... 59
3.21.1 Updating Payment Certificates for Consultants and Contractors 60
**GENERIC DATA ..... 61**
3.22 Funding Sources ..... 61
3.22.1 Adding A Funding Source ..... 61
3.22.2 Editing Funding Source information ..... 62
3.22.3 Viewing the budget for a Funding Source ..... 63
3.22.4 Viewing the Project Budget interrelated with a Funding Source 64
3.23 Project Types ..... 65
3.23.1 Adding a Project Type ..... 65
3.23.2 Adding a Phase associated with a Project Type ..... 66
3.23.2.1 Editing a Phase associated with a Project Type ..... 67
3.23.3 Editing a Project Type ..... 68
3.24 Programmes ..... 69
3.24.1 Adding a Programme ..... 69
3.24.2 Editing Programme information ..... 70
3.24.3 Removing a Programme ..... 71
3.25 Project Roles ..... 71
3.25.1 Adding a Project Role ..... 71
3.25.2 Editing a Project Role ..... 72
3.26 Sub Programme ..... 73

3.26.1 Adding a Sub Programme....73
3.26.2 Editing a Sub Programme....74
3.26.3 Removing a Sub Programme....75
3.27 Project Statuses....75
3.27.1 Adding a Project Status....75
3.27.2 Editing a Project Status....76
3.27.3 Removing a Project Status....77
3.28 Budget Statuses....77
3.28.1 Adding a Budget Status....77
3.28.2 Editing Budget Status description....78
3.29 Milestone Types....79
3.29.1 Adding a Milestone Type....79
3.29.2 Editing a Milestone Type....80
3.30 Changing the VAT rate....81
3.31 Services Provided....82
3.31.1 Adding a Service....82
3.31.2 Editing Service details....83
3.32 KPI – Setup....84
3.32.1 Adding a Criteria, Categories or Sub Categories....84
3.32.2 Editing a Criteria, Categories or Sub Categories....86
3.33 District Municipality....87
3.33.1 Adding a District Municipality....87
3.33.2 Editing District Municipality details....88
3.34 Local Municipality....89
3.34.1 Adding a Local Municipality....89
3.34.2 Editing Local Municipality details....90
**REPORTS....91**
3.35 Viewing reports....91
3.35.1 Viewing a list of Reports....91
3.35.2 View a report....92
3.35.3 Exporting reports in a different format....93

3.35.4 Setting up Report Filters ..... 96
3.35.5 Modifying Report Filters ..... 98

**SECURITY ..... 100**

3.36 Users ..... 100
3.36.1 Viewing a list of Current Users ..... 100
3.36.2 Adding a User ..... 100
3.36.2.1 Assigning a Role to a User ..... 101
3.36.2.2 Assigning District Access to a User ..... 102
3.36.2.3 Assigning Project Access to a User ..... 103
3.36.3 Editing User details ..... 104
3.36.4 Changing a User's password ..... 105
3.37 Security Setup ..... 106
3.37.1 Roles ..... 106
3.37.1.1 Adding a Role ..... 106
3.37.1.2 Editing a Role ..... 107
3.37.2 Setting Permissions for a Role ..... 108

# 1 INTRODUCTION & BACKGROUND

The Eastern Cape Department of Agriculture has numerous programmes running within the Eastern Cape Province. In order to manage these programmes and have an effective reporting system a proper information system should be in place guiding the department in terms of priorities and costs.

## 1.1 Objectives and Functionality of the APMIS

The Programme Management Module is designed to handle the month-to-month management of projects. Once a scope of work is identified for maintenance or new works, it will be packaged into a specific project, which will then proceed through normal channels to an implementation phase.

This Module manages costs and time on a project, by tracking budgets, invoices, payments and timelines. Successfully managing projects requires that a large number of factors be adequately dealt with but the first two that one needs to get right are ***time*** and ***cost***; this is the focus of this module.

It is this module that will most likely be used the most on a day-to-day basis.

Conceptually using this module is easy with the following steps:

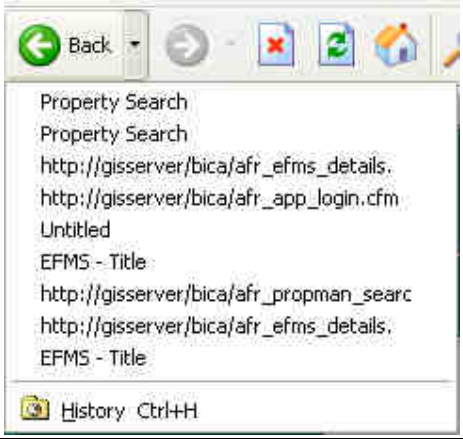
- Create a project by adding it to the programme management module.
- Enter all the key data at the beginning, this includes where budget comes from (sources available), where it is going to (service provided budgets), what the key phases and milestones are, and what the expected cashflows are.
- Track actual progress in terms of expenditure and milestone achievement
  Report on the above.

# 2 TERMINOLOGY USED IN THIS MANUAL

## 2.1 The Web Browser

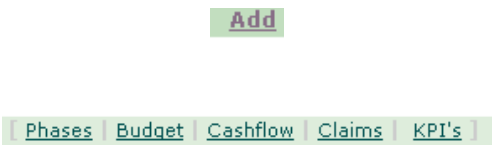
The Web front-end allows multiple users access from any point on the network. It is assumed that the users are familiar with a Web Browser. However, just to refresh:

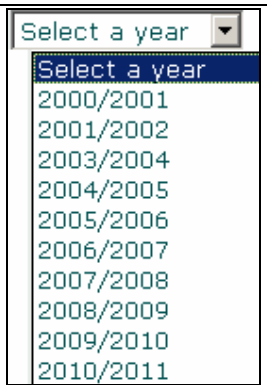
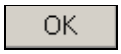
- To open Internet Explorer, click **Start**, point to **Programs**, and then click **Internet Explorer**. Alternatively, double-click on the Internet Explorer icon on the Desktop.
- For information about using Internet Explorer, click the **Help** menu in Internet Explorer.

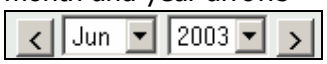
| Button | Picture | Description |
|---|---|---|
| Back | | Allows you to move backwards through the sequence of previous pages you have opened. |
| Forward | | Allows you to move forwards through the sequence of previous pages you have opened. |
| |  | To see a list of the last few pages you visited, click the drop-down arrow beside the **Back** button. |

| Button | Picture | Description |
|---|---|---|
| Refresh | | Click the **Refresh** button in the following cases:<br>• If the Web page doesn't seem to be working<br>• If a page is taking too long to open,<br>• If you get a message that a Web page cannot be displayed, or you want to make sure you have the latest version of the page. |
| Home | | To return to the page that appears each time you start Internet Explorer, click the **Home** button. |

## 2.2 Terminology used in the Programme Management Module

| Term | Picture | Description |
|---|---|---|
| Menu Tree | | The ⊞ sign on the Menu Bar allows you to expand and contract the available menu options. Click on the ⊞ sign to expand a sub-menu for the Programme Module menu. Click on the ⊟ sign to collapse the menu. |
| Hyperlink |  | Underlined text that links to another place in the same Programme Management Module window or to an entirely different window.<br>When you place your cursor over the text, it turns into a "*hand*". Click on the hypertext to follow the link. |

| Term | Picture | Description |
|---|---|---|
| Text Box | | Text boxes are used to enter words, numbers or dates into the system. |
| Drop-down list |   | A drop-down list is a text box that contains a list of options. These are used to minimise typing errors and to limit the choice that you make by displaying specific options that have to be used. Click on an option to select it. |
| Button |   | Click on a button to perform a specific task. The task is indicated by the name or picture on the button. |
| Vertical scroll bar | | Click on UP or DOWN scroll buttons to move through page bit by bit. Drag Scroll to move faster. |
| Horizontal scroll bar | | Click on LEFT or RIGHT scroll buttons to move through page bit by bit. Drag Scroll to move faster. |
| Radio button | | Click in this button with the mouse to select it. Only one option can be selected at a time. |

| Term | Picture | Description |
|---|---|---|
| Check box | | Click in this box with the mouse to select it. |
| Date selector | | Use to enter a date everywhere in the Programme Management Module. Click on the button to open the calendar. Use month and year arrows   to move to next/previous dates. Click on day to select it. |
| Viewing items in a list on screen | | Not all the items in a list can be displayed simultaneously on screen. Click on NEXT button to view subsequent items in a list, or PREVIOUS button to view preceding items. |

# 3 PROGRAMME MANAGEMENT

## 3.1 Opening the APMIS Home Page

1. Double-click on the APMIS System icon on your Desktop

   *Note: The APMIS System Home Page opens*

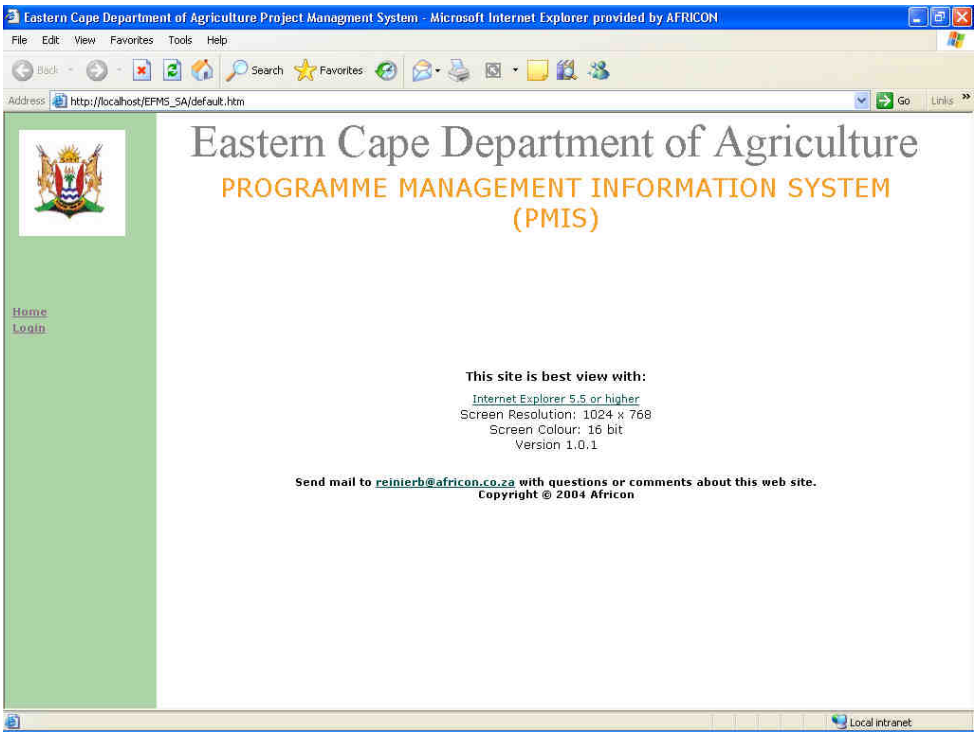
   **Alternatively:**

2. Click on the **START** button on your Windows Taskbar
3. Point to **Programs**
4. Click **Internet Explorer**

   *Note: Internet Explorer window opens*

5. Type in the Home Page address for the APMIS System in the address bar, e.g.: *http://10.219.9.253/EFMS_SA/default.htm*
6. Press ENTER

   *Note: The APMIS System Home Page opens*

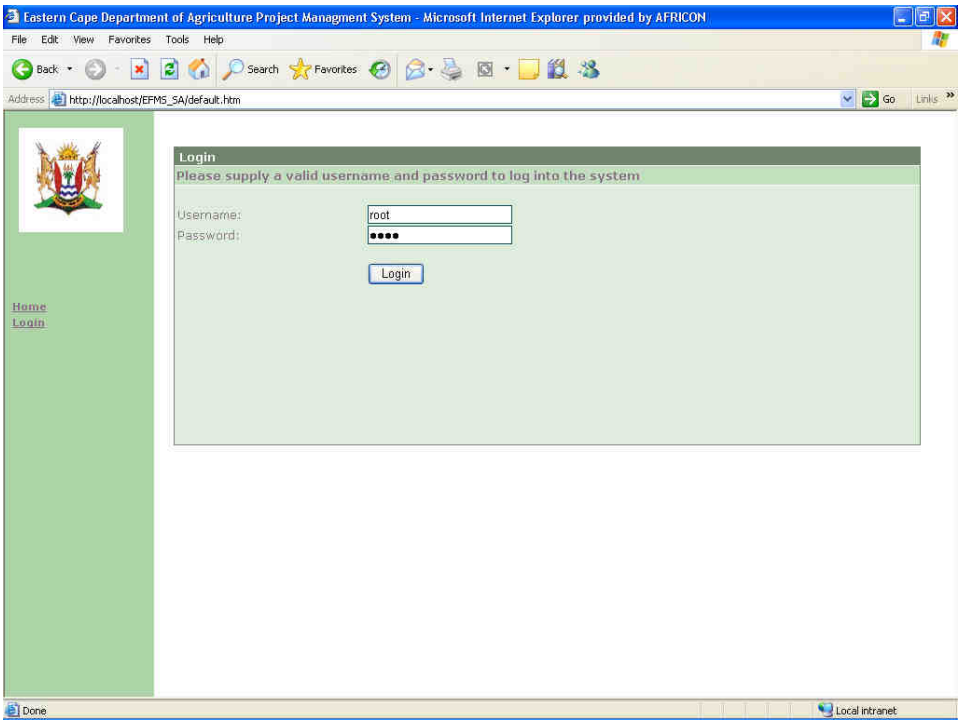

Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Search Favorites
Address http://localhost/EFMS_SA/default.htm
Go
Eastern Cape Department of Agriculture
PROGRAMME MANAGEMENT INFORMATION SYSTEM
(PMIS)
Home
Login
This site is best view with:
Internet Explorer 5.5 or higher
Screen Resolution: 1024 x 768
Screen Colour: 16 bit
Version 1.0.1
Send mail to reinierb@africon.co.za with questions or comments about this web site.
Copyright © 2004 Africon
Local intranet

## 3.2 Logging into the System

The APMIS System Administrator automatically allocates you with a password when your profile is added to the system.

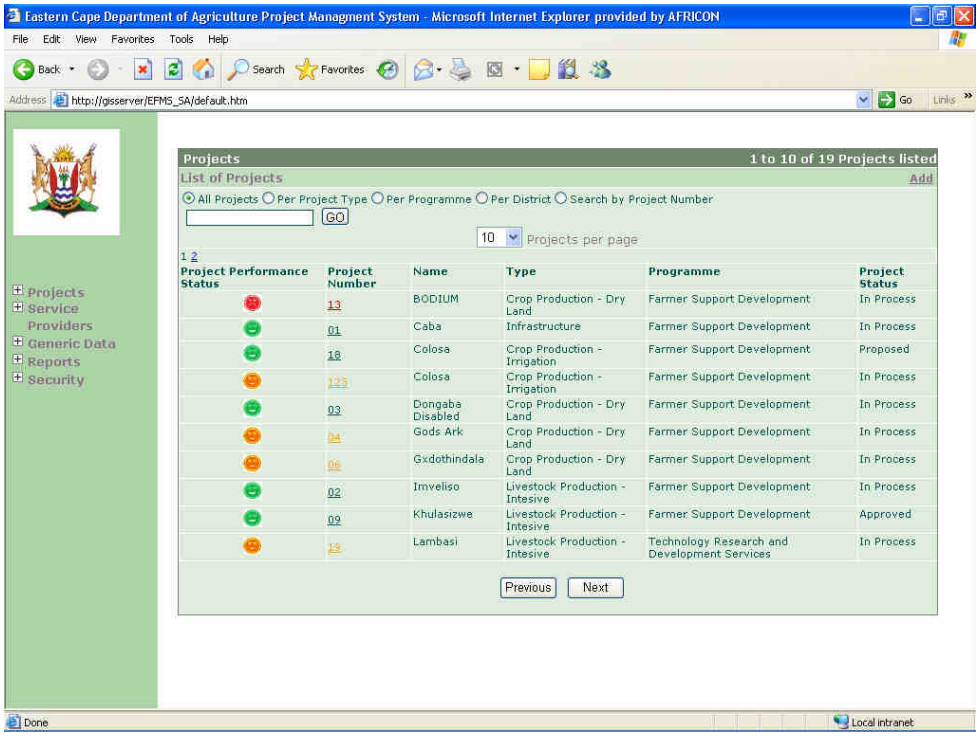
1. Open your Web Browser
2. Open the APMIS home page
3. Click on the login hyperlink below the home hyperlink

   *Note: The "Login" screen opens*




4. Enter your user name in the "User Name" text box
5. Enter your password in the "Password" text box
6. Click on the LOGIN button. *Note: The "Projects" page opens, with projects listed sequentially by tender number*

***For security purposes, the System will automatically log out inactive users after 10 minutes.***


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Projects
1 to 10 of 19 Projects listed
List of Projects
Add
All Projects Per Project Type Per Programme Per District Search by Project Number
GO
10 Projects per page
1 2
Project Performance Status
Project Number
Name
Type
Programme
Project Status
13 BODIUM Crop Production - Dry Land Farmer Support Development In Process
01 Caba Infrastructure Farmer Support Development In Process
18 Colosa Crop Production - Irrigation Farmer Support Development Proposed
123 Colosa Crop Production - Irrigation Farmer Support Development In Process
03 Dongaba Disabled Crop Production - Dry Land Farmer Support Development In Process
04 Gods Ark Crop Production - Dry Land Farmer Support Development In Process
06 Gxdothindala Crop Production - Dry Land Farmer Support Development In Process
02 Imveliso Livestock Production - Intesive Farmer Support Development In Process
09 Khulasizwe Livestock Production - Intesive Farmer Support Development Approved
19 Lambasi Livestock Production - Intesive Technology Research and Development Services In Process
Previous
Next
Done
Local intranet

# PROJECTS

## 3.3 Viewing Projects

### 3.3.1 Viewing all Projects

1. Login to the system by entering the "user name" and "pazssword"

   *Note: The "Projects" page opens, with projects listed sequentially by tender number*

   **Alternatively:**

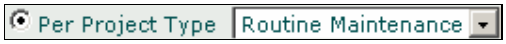
2. Expand the ***Projects*** menu and click on the "*View All*" hyperlink

   *Note: The "Projects" page opens, with projects listed sequentially by tender number*

### 3.3.2 Filtering Projects per Type

1. Open the "*Projects*" page as described above in 3.3.1

2. Select the "Per Project Type" radio button




3. Select required Project Type from the drop-down list

*Note: Project are filtered per selected Project Type*

### 3.3.3 Filtering Projects per Programme

1. Open the "*Projects*" page as described above in 3.3.1
2. Select the "Per Programme" radio button

3. Select required Project Programme from the drop-down list

*Note: Project are filtered per selected Project Programme*

### 3.3.4 Filtering Projects per District

1. Open the "*Projects*" page as described above in 3.3.1
2. Select the "Per District" radio button

3. Select required District from the drop-down list

*Note: Project are filtered per selected District*

## 3.4 Searching for a Project

1. Open the "*Projects*" page as described above in 3.3.1
2. Select the "Search by Tender Number" radio button

3. Enter required tender number (or part of number) in "Search" text box
4. Click on the GO button

*Note: Project are filtered per selected tender number (or part of number)*

## 3.5 Adding a Project

1. Click on the "*Programme Management"* hyperlink on the Module Menu

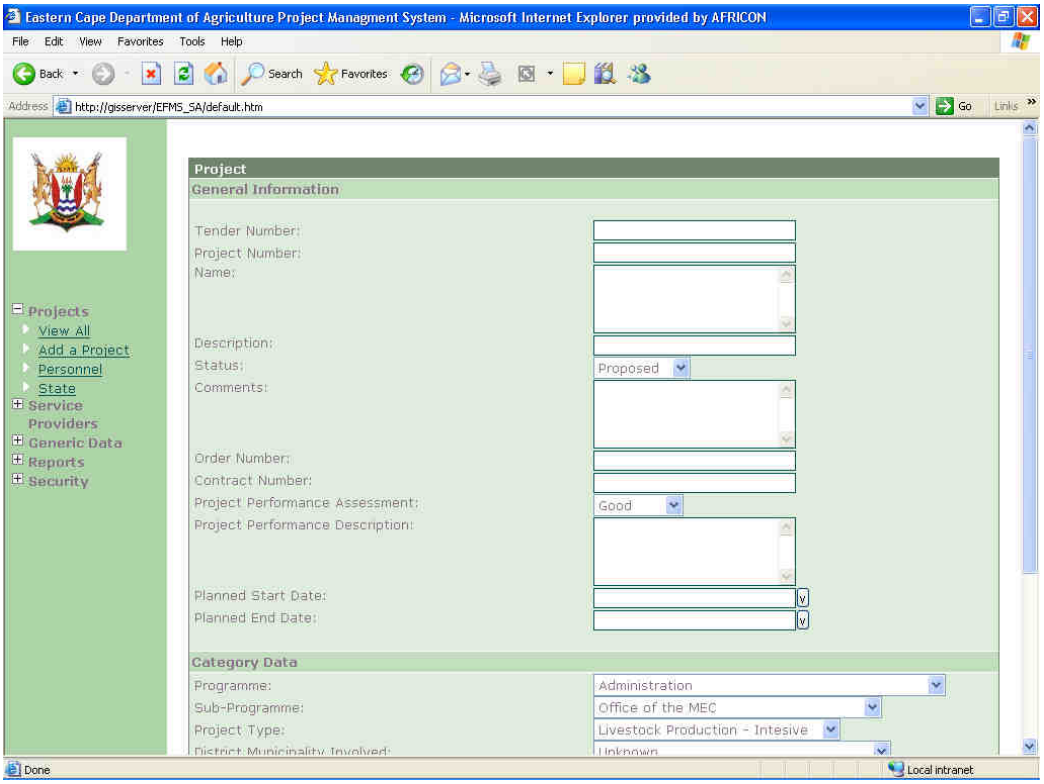
   *Note: The "Projects" page opens, with projects listed sequentially by tender number*

2. Click on the "Add: hyperlink next to "List of Projects"

   **Alternatively:**

3. Click on the "*Programme Management"* hyperlink on the Module Menu
4. Expand the ***Projects*** menu and click on the "*Add a Project*" hyperlink

   *Note: The "Project" page opens*




5. Enter all the General Information, Category Data and Development Information
6. Click on the OK button

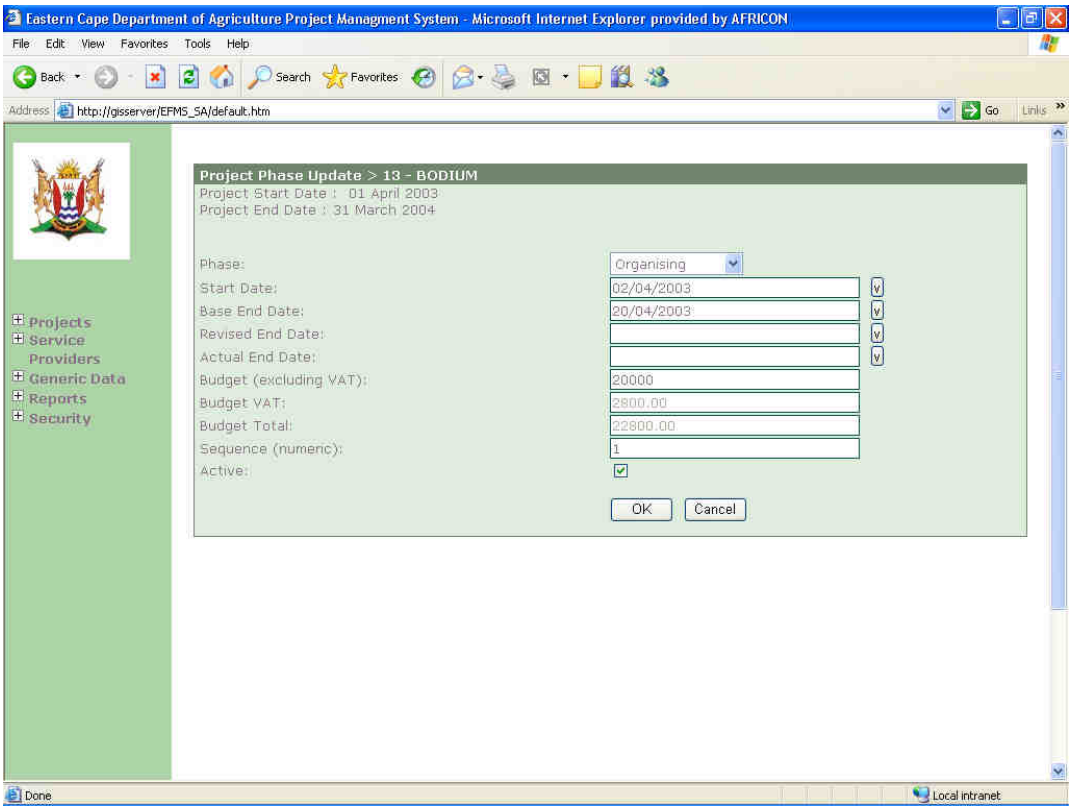
   *Note: The "Project <Name>" page opens, displaying all related project detail*

## 3.6 Adding Phases for a Project

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

   *Note: The "Project Phases -<Project Name>" page opens*
3. Click on the "*Add*" hyperlink

   *Note*: The *"Project Phase Update-<Project Name>"* page opens




4. Enter all the relevant information

***The System Administrator should assign Phases to a Project Type first. If you cannot assign a Phase, contact your System Administrator.***

***Start and end dates for Phase must fall within start and end period for Project.***

***"Revised End Date" and "Actual End Date" must be updated as project progresses.***

***Make sure to add Budget figures for phase EXCLUDING VAT as prompted on the page.***

5. Click on the OK button

   *Note: The "Project Phases -<Project Name>" page opens, listing the new active phase*

6. Repeat the above steps to add all the required phases

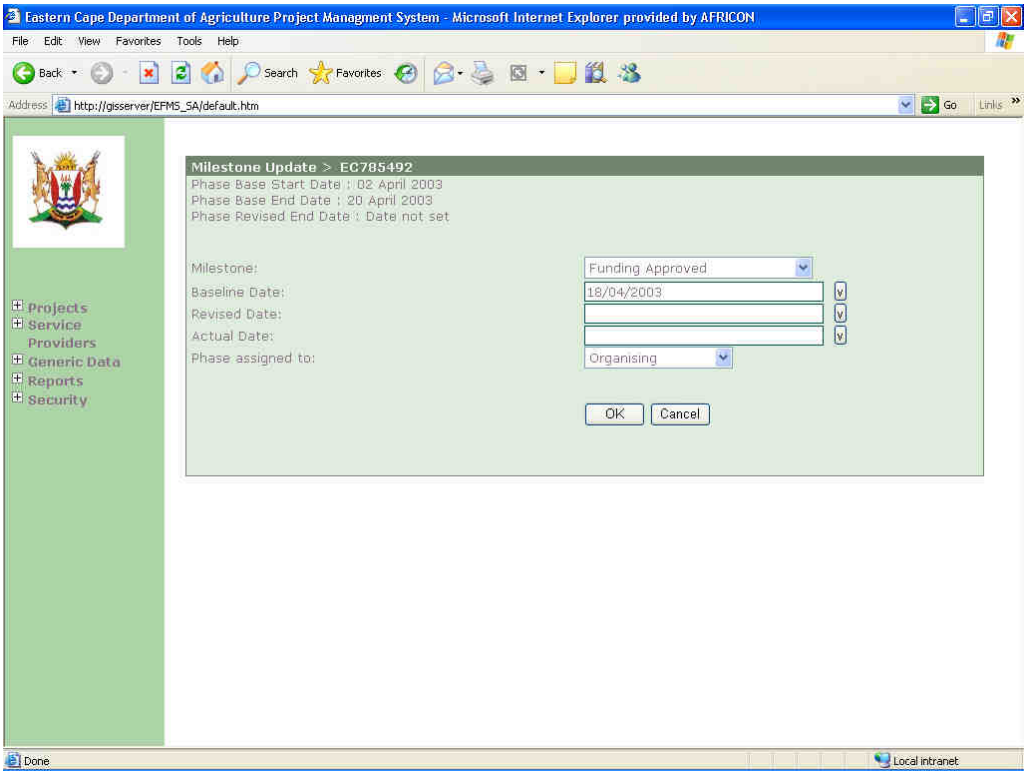
### 3.6.1 Adding Milestones for a Phase

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

   *Note: The "Project Phases -<Project Name>" page opens*

3. Click on the "*Add Milestones*" hyperlink next to the required phase

   *Note: The "Milestone Update -<Project Name>" page opens*




4. Enter relevant information

***The Milestone's dates must fall within the overall Phase's start and end date.***

***You cannot assign a Milestone to more than one Phase.***

5. Click on the OK button

   *Note: The "Project Phases -<Project Name>" page opens, displaying new milestone*

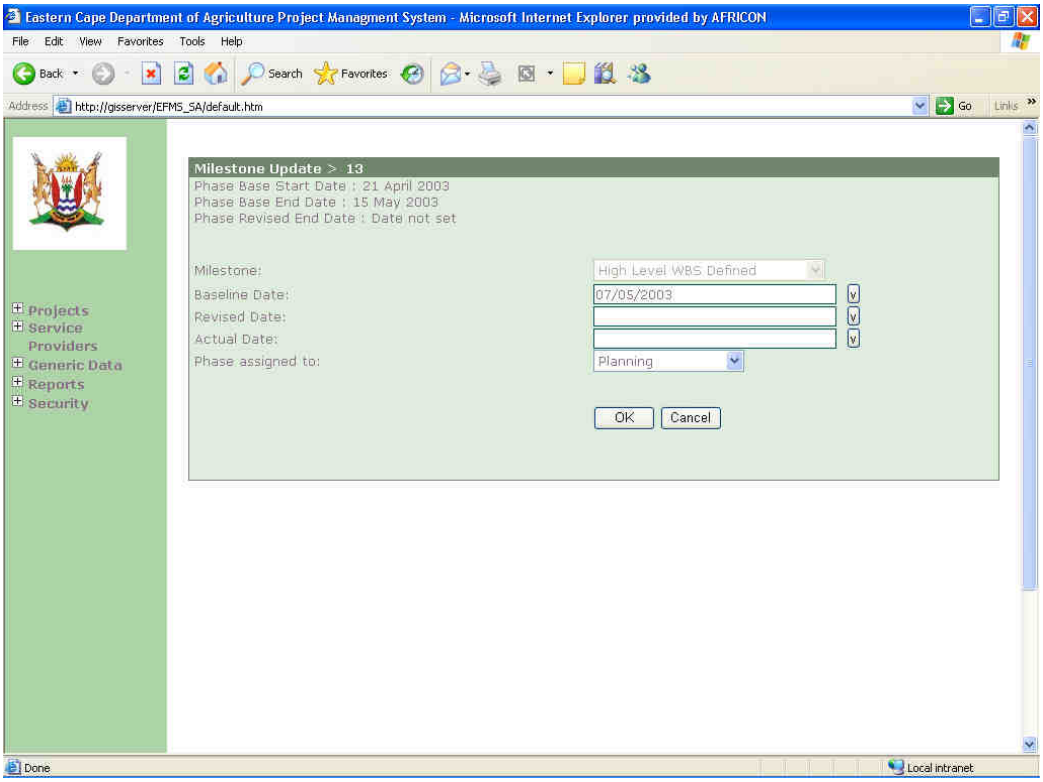
## 3.6.2 Editing Milestone information

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

*Note: The "Project Phases -<Project Name>" page opens*

3. Click on the "*Edit*" hyperlink next to the required milestone

*Note: The "Milestone Update -<Project Name>" page opens*




4. Change information as desired
5. Click on the OK button

*Note: Revised Milestone information is displayed on the "Project Phases -<Project Name>" page*

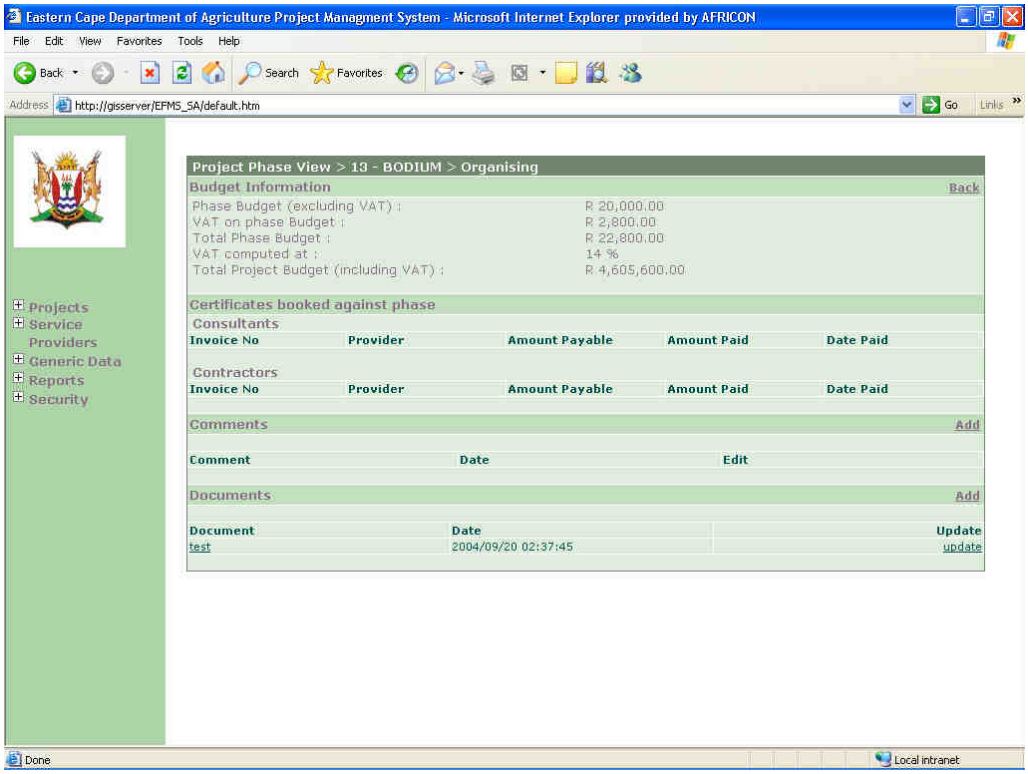
### 3.6.3 Viewing Phase Budget Information

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

*Note: The "Project Phases -<Project Name>" page opens*

3. Click on the appropriate Phase Name hyperlink

*Note: The "Project Phase View -<Project name> <Phase name>" page opens*




### 3.6.4 Viewing a list of Consultant and Contractor Certificates booked against Phase

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

   *Note: The "Project Phases -<Project Name>" page opens*
3. Click on the appropriate Phase Name hyperlink

   *Note: The "Project Phase View -<Project name> <Phase name>" page opens, displaying a list of Certificates booked against Phase*

***This information will only materialize once Claim information has been added as described in 3.12.2 below.***

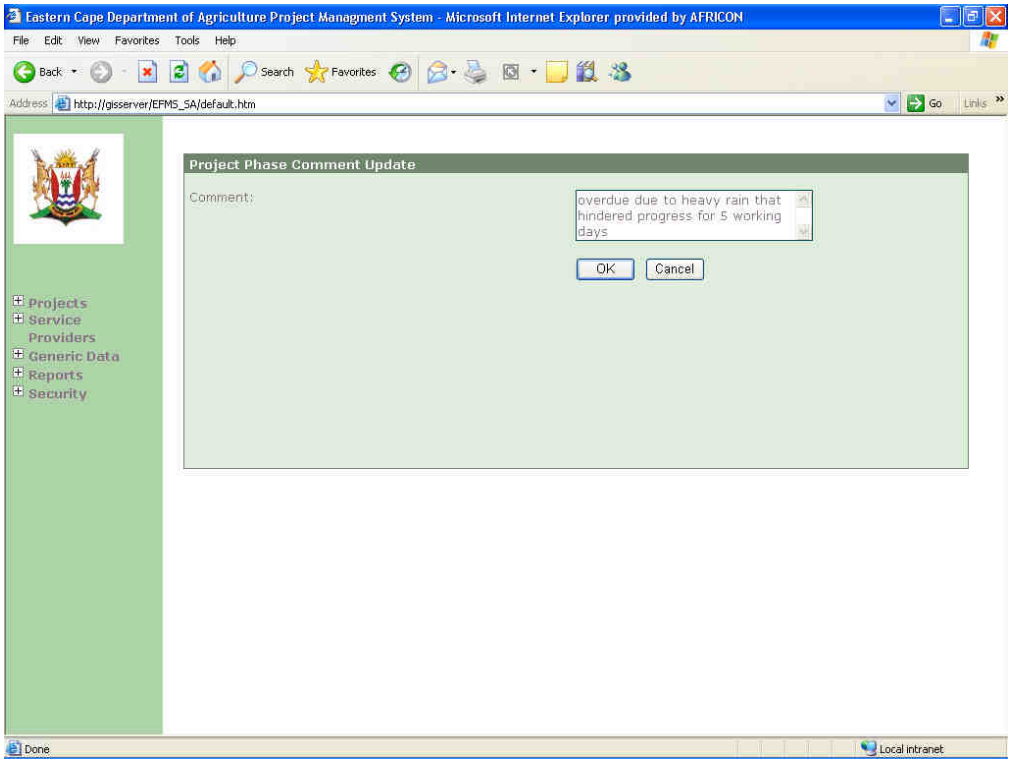
### 3.6.5 Adding Comments for a Phase

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

   *Note: The "Project Phases -<Project Name>" page opens*
3. Click on the appropriate Phase Name hyperlink

   *Note: The "Project Phase View -<Project name> <Phase name>" page opens*
4. Click on the "*Add*" hyperlink next to "Comments"

   *Note: The "Project Phase Comment Update" page opens*




5. Add comment in the "Comment" text box
6. Click on the OK button

   *Note: Comment is displayed on the "Project Phase View -<Project name> <Phase name>" page*

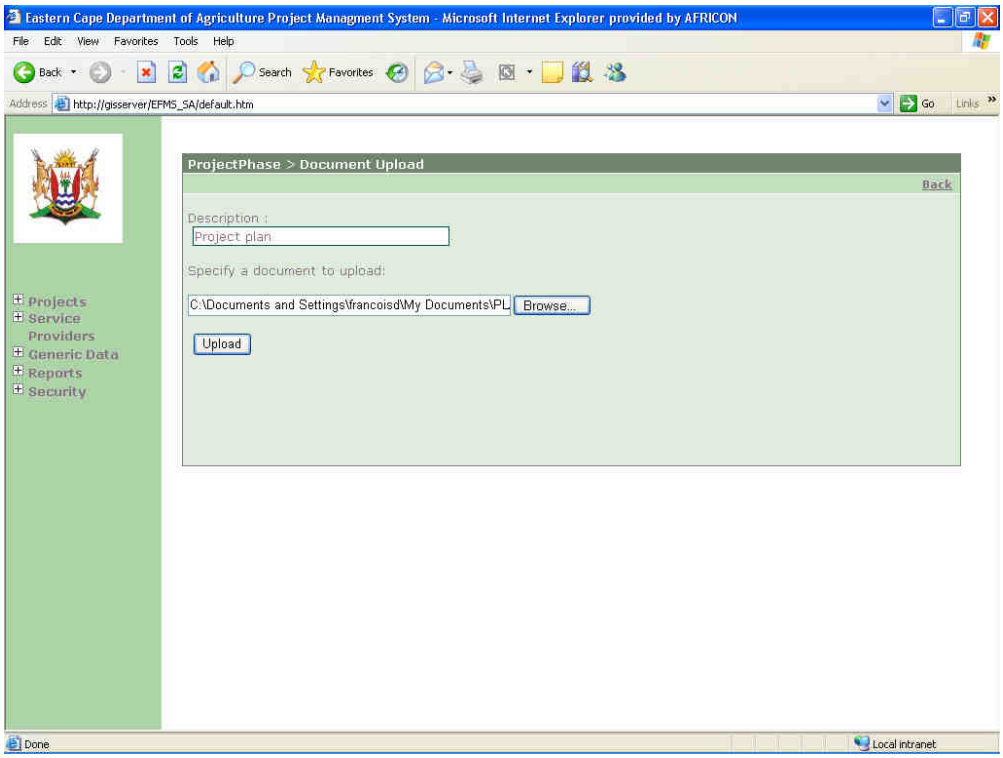
### 3.6.6 Uploading Documents applicable to Phase

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

   *Note: The "Project Phases -<Project Name>" page opens*
3. Click on the appropriate Phase Name hyperlink

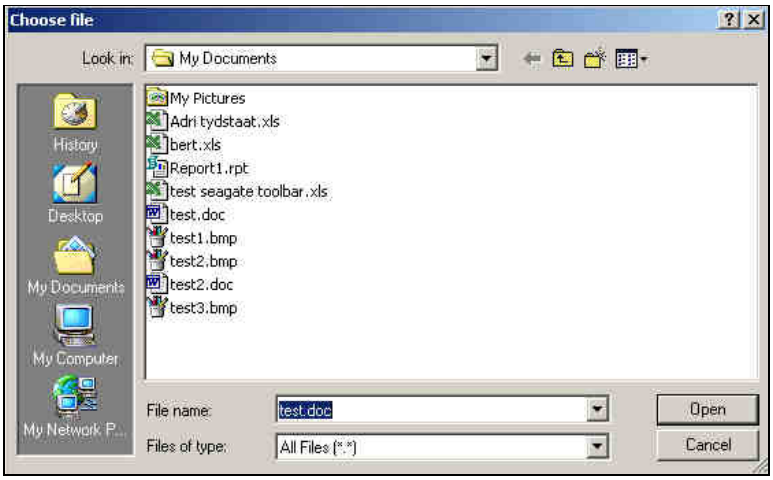
   *Note: The "Project Phase View -<Project name> <Phase name>" page opens*
4. Click on the "*Add*" hyperlink next to "Documents"

   *Note: The "Project Phase >Document Upload" page opens*




5. Enter a description in the "Description" text box
6. Click on the BROWSE button

   *Note: The "Choose file" box opens*




7. Specify file path
8. Click on the OPEN button

   *Note: File path is displayed*
9. Click on the UPLOAD button

   *Note: Document is listed on "Project Phase View -<Project name> <Phase name>" page*
10. Click on document name hyperlink to view

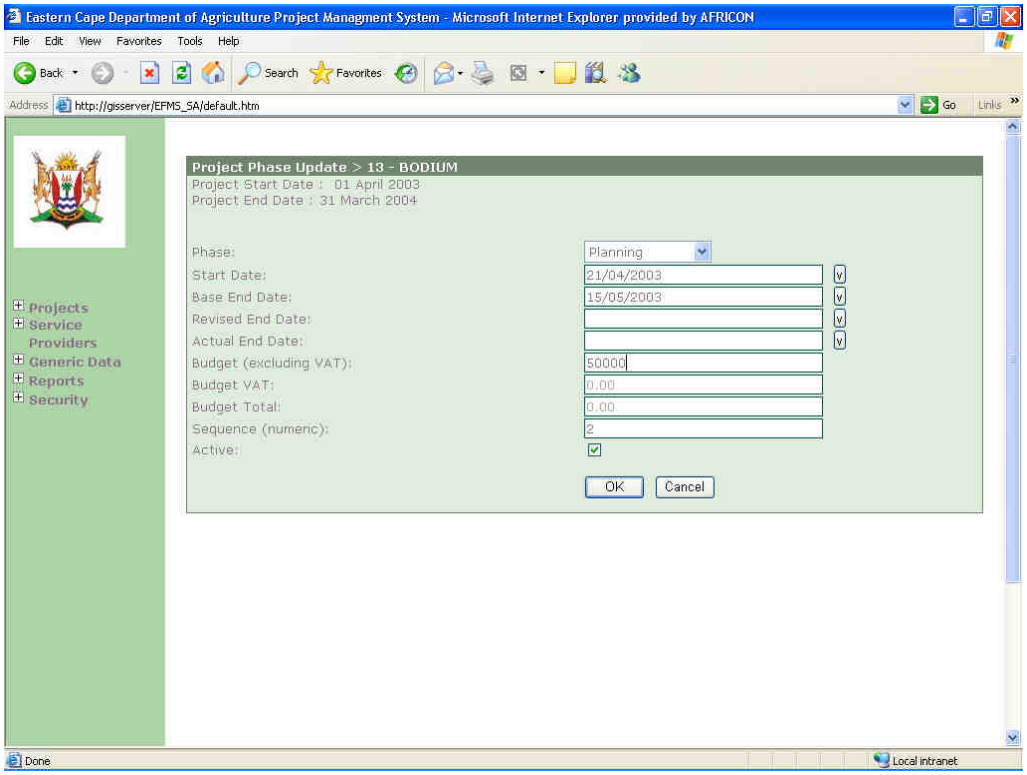
***The document can only be viewed. Any changes must still be made in source program. Repeat steps above to add any revisions or new documentation.***

## 3.7 Editing Phase information

1. Open the "*Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

   *Note: The "Project Phases -<Project Name>" page opens*
3. Click on the "*Edit*" hyperlink next to the required phase

   *Note: The "Project Phase Update -<Project Name>" page opens*




4. Change information as desired
5. Click on the OK button

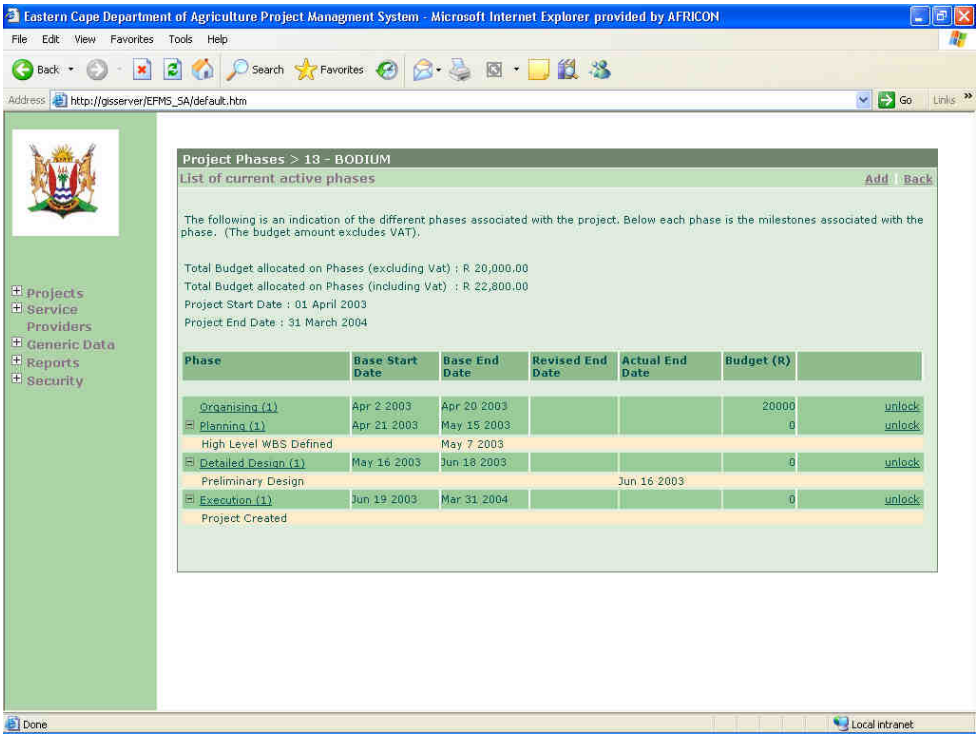
   *Note: Revised Phase information is displayed on the "Project Phases - <Project Name>" page*

## 3.8 Locking Phase information

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

   *Note: The "Project Phases -<Project Name>" page opens*
3. Click on the "*Lock*" hyperlink next to the required phase

   *Note: The "Project Phases -<Project Name>" page indicates that the phase is locked*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Project Phases > 13 - BODIUM
List of current active phases
Add Back
The following is an indication of the different phases associated with the project. Below each phase is the milestones associated with the phase. (The budget amount excludes VAT).
Total Budget allocated on Phases (excluding Vat) : R 20,000.00
Total Budget allocated on Phases (including Vat) : R 22,800.00
Project Start Date : 01 April 2003
Project End Date : 31 March 2004
Phase
Base Start Date
Base End Date
Revised End Date
Actual End Date
Budget (R)
Organising (1) Apr 2 2003 Apr 20 2003 20000 unlock
Planning (1) Apr 21 2003 May 15 2003 0 unlock
High Level WBS Defined May 7 2003
Detailed Design (1) May 16 2003 Jun 18 2003 0 unlock
Preliminary Design Jun 16 2003
Execution (1) Jun 19 2003 Mar 31 2004 0 unlock
Project Created
Done
Local intranet

***Only a user with appropriate Rights, e.g. the Project leader, can lock or unlock phase information.***

### 3.8.1 Unlocking Phase information

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Phases*" hyperlink under "Category Data"

   *Note: The "Project Phases -<Project Name>" page opens*
3. Click on the *"Unlock"* hyperlink next to the required phase

   *Note: The "Project Phases -<Project Name>" page indicates that the phase is unlocked*

## 3.9 Adding a Budget for a Project

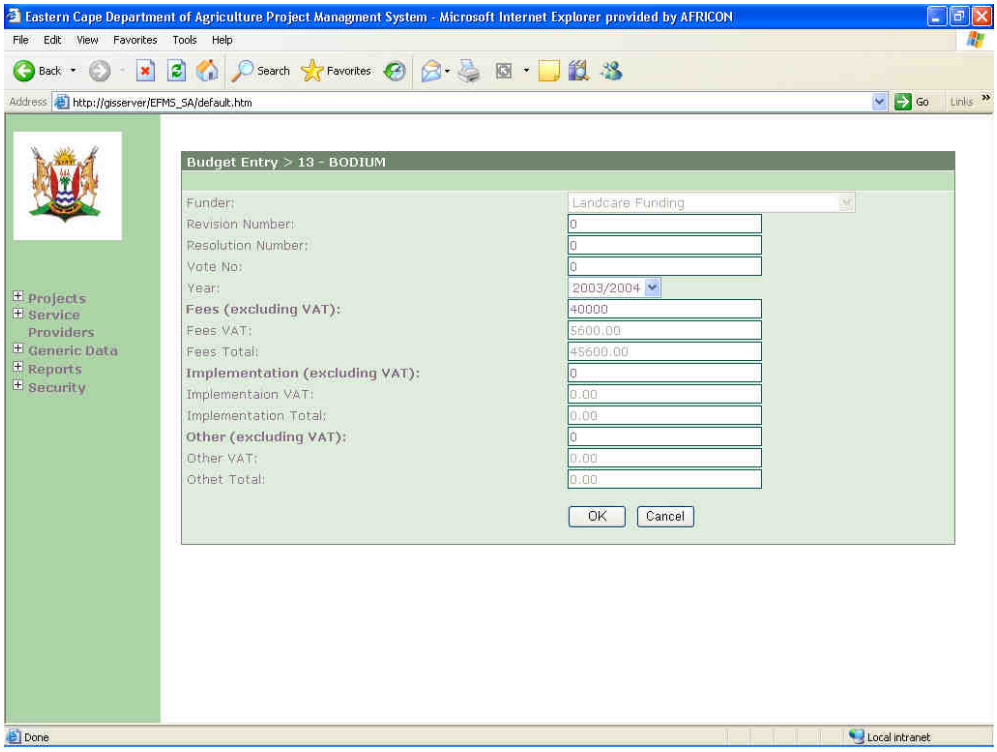
1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above

2. Click on the "*Budget*" hyperlink under "Category Data"

   *Note: The "Project Budget -<Project Name>" page opens*

3. Click on the "Add" hyperlink

   *Note: The "Budget Entry -<Project Name>" page opens*




4. Enter budget information

***Make sure to add all figures EXCLUDING VAT as prompted on the page. The programme will add VAT automatically***

5. Click on the OK button

   *Note: The new budget information is displayed on the "Project Budget -<Project Name>" page*

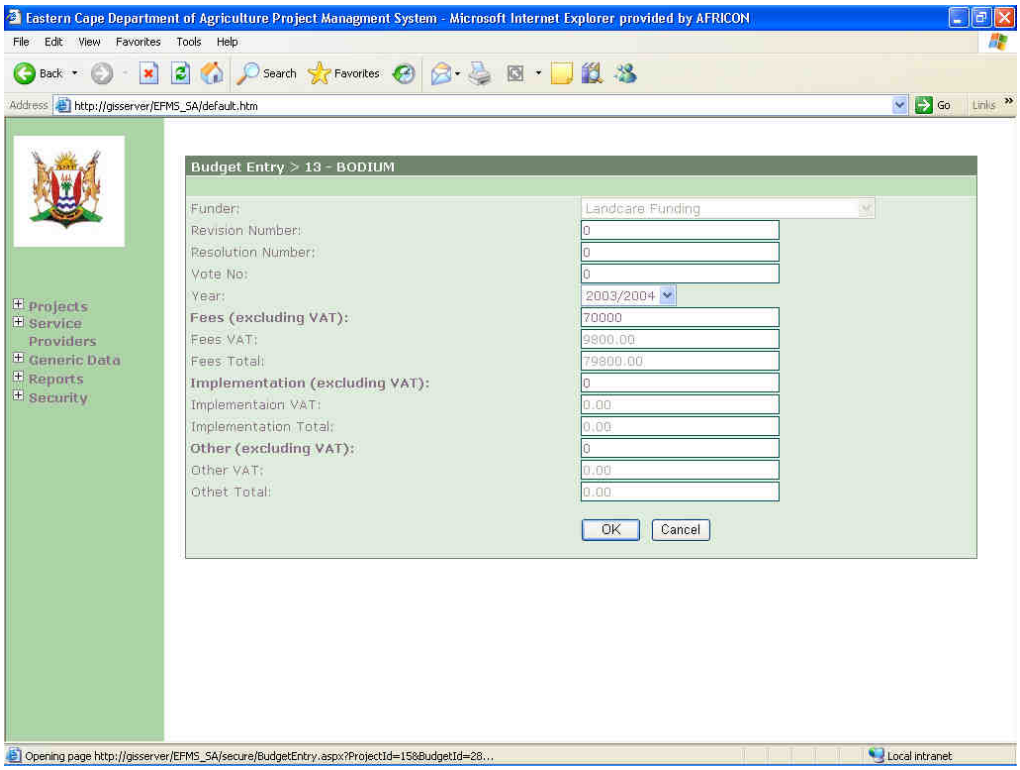
6. Repeat the above steps to enter all the required budgets

### 3.9.1 Editing Budget Information

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Budget*" hyperlink under "Category Data"

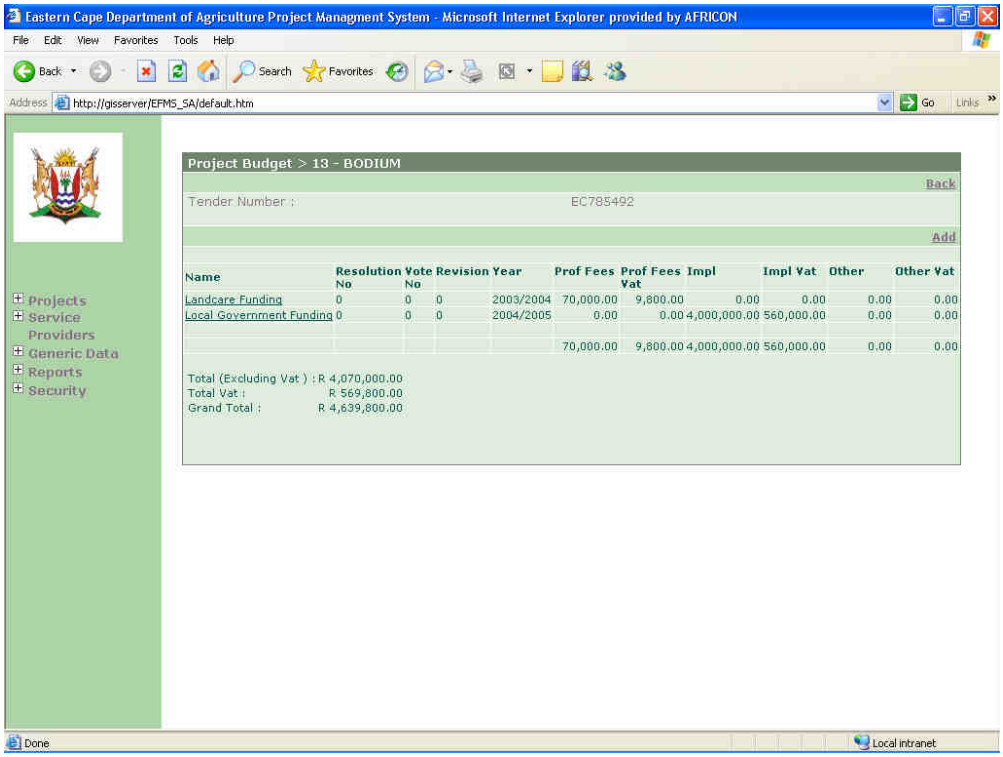
   *Note: The "Project Budget -<Project Name>" page opens*
3. Click on the required budget name hyperlink

   *Note: The "Budget Entry -<Project Name>" page opens*




4. Modify budget information
5. Click on the OK button

   *Note: Revised budget information is displayed on the "Project Budget -<Project Name>" page*

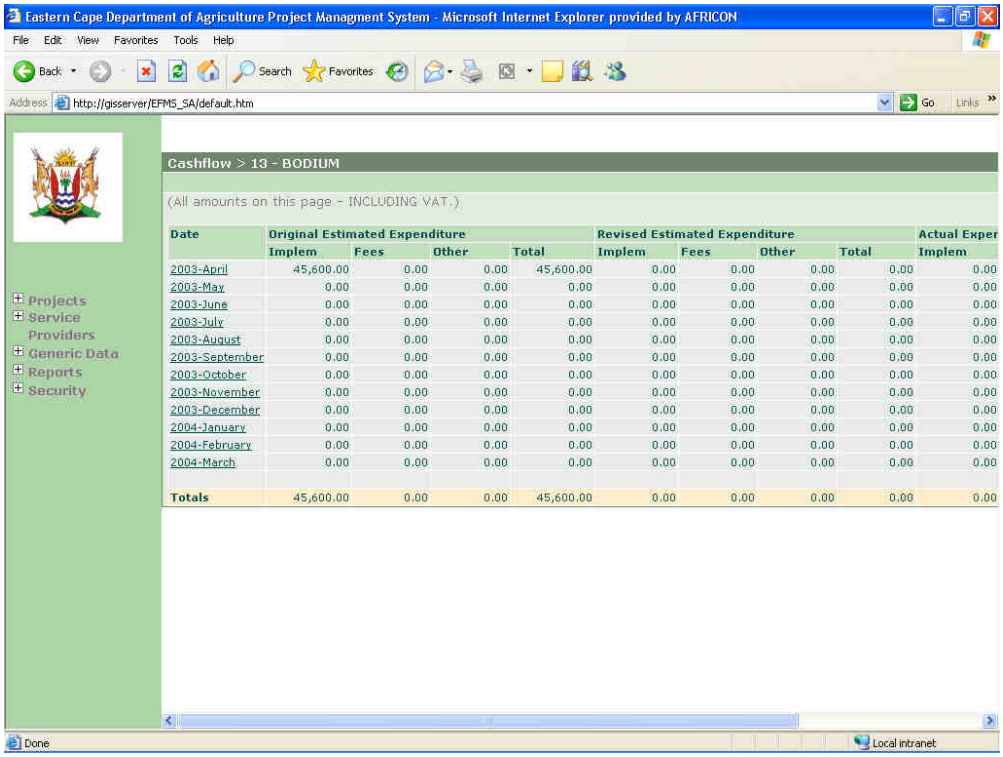

Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Project Budget > 13 - BODIUM
Back
Tender Number : EC785492
Add
Name | Resolution No | Vote No | Revision | Year | Prof Fees | Prof Fees Vat | Impl | Impl Vat | Other | Other Vat
Landcare Funding | 0 | 0 | 0 | 2003/2004 | 70,000.00 | 9,800.00 | 0.00 | 0.00 | 0.00 | 0.00
Local Government Funding | 0 | 0 | 0 | 2004/2005 | 0.00 | 0.00 | 4,000,000.00 | 560,000.00 | 0.00 | 0.00
70,000.00 | 9,800.00 | 4,000,000.00 | 560,000.00 | 0.00 | 0.00
Total (Excluding Vat ) : R 4,070,000.00
Total Vat : R 569,800.00
Grand Total : R 4,639,800.00
Done
Local intranet

***The Budget total is displayed on the "Project <Name of Project>" page, under "Project Costs: Funds applied".***

## 3.10 Adding Cashflow Expenditure

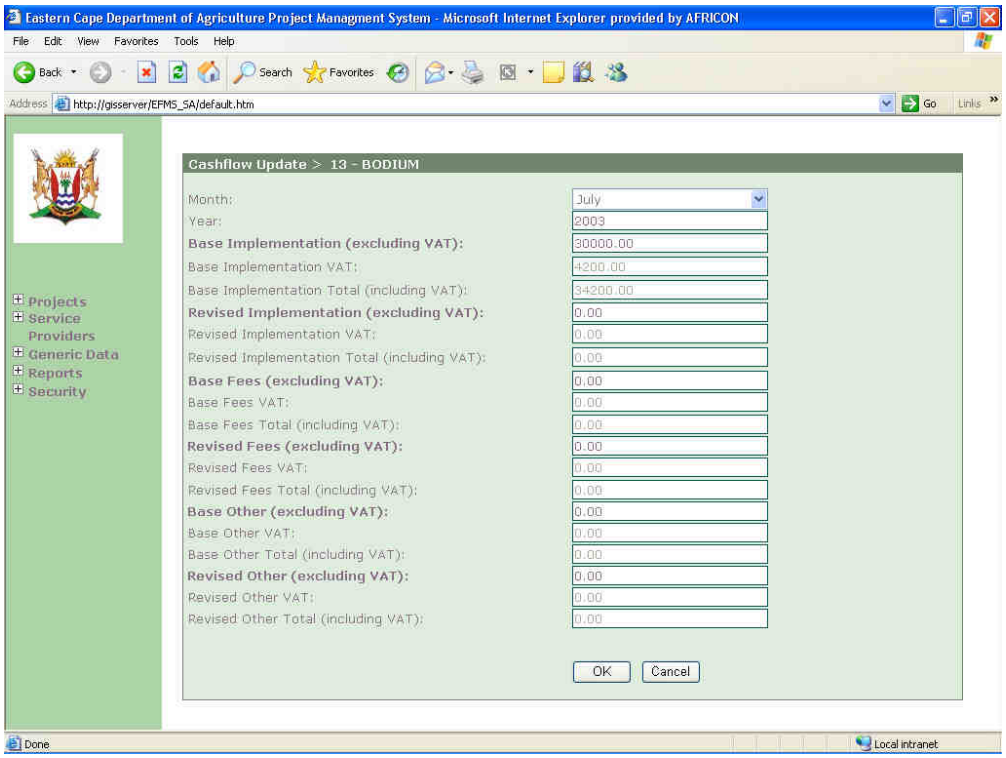
1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Cashflow*" hyperlink under "Category Data"

   *Note: The "Cashflow -<Project Name>" page opens, displaying all the months in the Project period sequentially*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Cashflow > 13 - BODIUM
(All amounts on this page - INCLUDING VAT.)
Date
Original Estimated Expenditure
Revised Estimated Expenditure
Actual Exper
Implem Fees Other Total Implem Fees Other Total Implem
2003-April 45,600.00 0.00 0.00 45,600.00 0.00 0.00 0.00 0.00 0.00
2003-May 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2003-June 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2003-July 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2003-August 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2003-September 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2003-October 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2003-November 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2003-December 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2004-January 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2004-February 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2004-March 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
Totals 45,600.00 0.00 0.00 45,600.00 0.00 0.00 0.00 0.00 0.00
Done
Local intranet

3. Click on the required "*Month*" hyperlink

   *Note: The "Cashflow Update -<Project Name>" page opens*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Cashflow Update > 13 - BODIUM
Month: July
Year: 2003
Base Implementation (excluding VAT): 30000.00
Base Implementation VAT: 4200.00
Base Implementation Total (including VAT): 34200.00
Revised Implementation (excluding VAT): 0.00
Revised Implementation VAT: 0.00
Revised Implementation Total (including VAT): 0.00
Base Fees (excluding VAT): 0.00
Base Fees VAT: 0.00
Base Fees Total (including VAT): 0.00
Revised Fees (excluding VAT): 0.00
Revised Fees VAT: 0.00
Revised Fees Total (including VAT): 0.00
Base Other (excluding VAT): 0.00
Base Other VAT: 0.00
Base Other Total (including VAT): 0.00
Revised Other (excluding VAT): 0.00
Revised Other VAT: 0.00
Revised Other Total (including VAT): 0.00
OK Cancel
Done
Local intranet

4. Enter figures for Base and Revised Estimated expenditure

***Make sure to add all figures EXCLUDING VAT as prompted on the page. The programme will add VAT automatically.***

5. Click on the OK button

   *Note: Estimated Expenditure is displayed on the "Cashflow -<Project Name>" page*

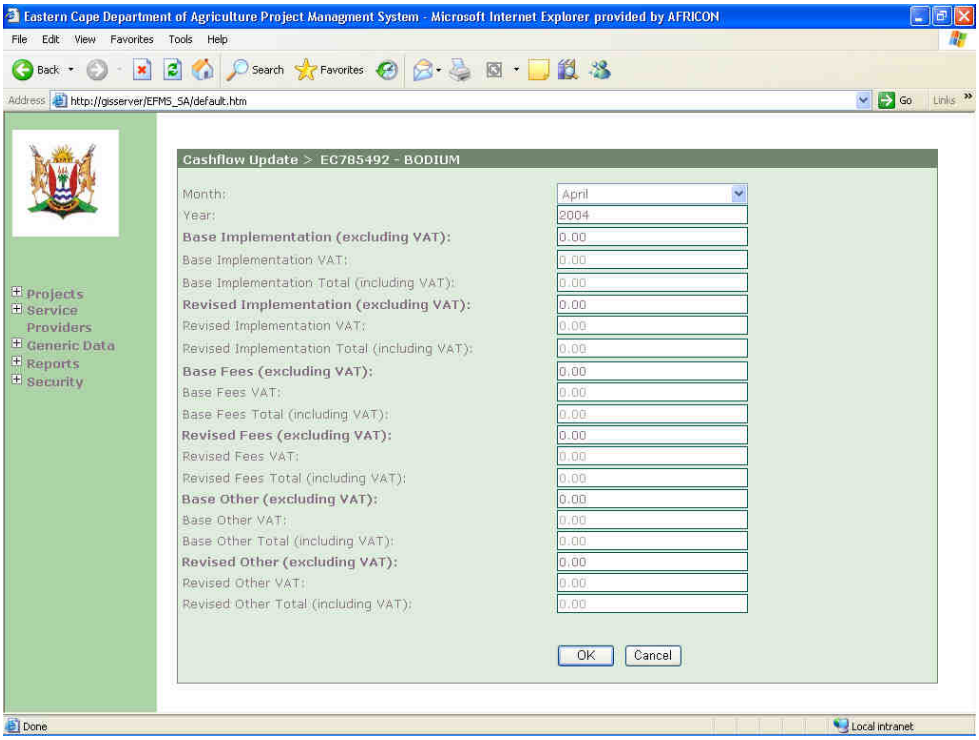
***Actual Expenditure figures information will only materialize once Claim information has been added as described in 3.12.2 below.***

### 3.10.1 Adding an additional Month to Cashflow period

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Cashflow*" hyperlink under "Category Data"

   *Note: The "Cashflow -<Project Name>" page opens, displaying all the months in the Project period sequentially*
3. Click on the "*Add Financial Month*" hyperlink

   *Note: The "Cashflow Update -<Project Name>" page opens*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Cashflow Update > EC785492 - BODIUM
Month: April
Year: 2004
Base Implementation (excluding VAT): 0.00
Base Implementation VAT: 0.00
Base Implementation Total (including VAT): 0.00
Revised Implementation (excluding VAT): 0.00
Revised Implementation VAT: 0.00
Revised Implementation Total (including VAT): 0.00
Base Fees (excluding VAT): 0.00
Base Fees VAT: 0.00
Base Fees Total (including VAT): 0.00
Revised Fees (excluding VAT): 0.00
Revised Fees VAT: 0.00
Revised Fees Total (including VAT): 0.00
Base Other (excluding VAT): 0.00
Base Other VAT: 0.00
Base Other Total (including VAT): 0.00
Revised Other (excluding VAT): 0.00
Revised Other VAT: 0.00
Revised Other Total (including VAT): 0.00
OK
Cancel
Done
Local intranet

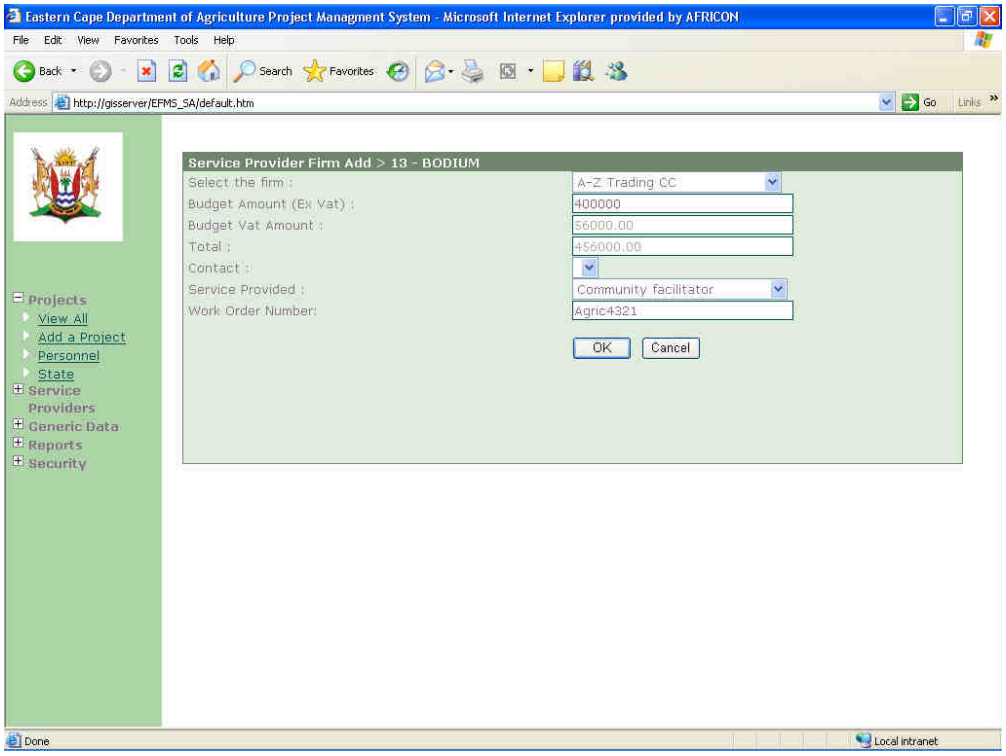
4. Enter new month and year and relevant Expenditure information
5. Click on the OK button

   *Note: New month is listed on the "Cashflow -<Project Name>" page*

## 3.11 Adding Service Providers for a Project

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Add*" hyperlink next to "**Service Providers: Application of Funds**"

   *Note: The "Service Provider Firm Add -<Project Name>" page opens*



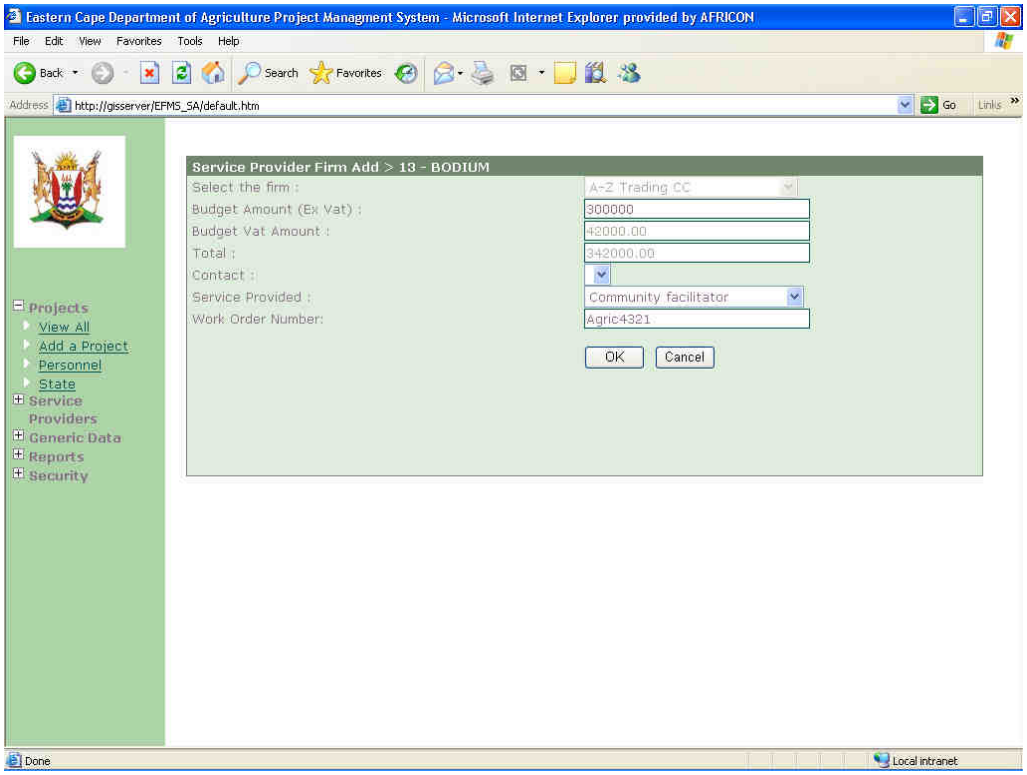

3. Enter Service Provider details
4. Click on the OK button

   *Note: Service Provider Details are displayed on the "Project <Name>" page*

### 3.11.1 Editing Service Provider details

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Service Provider name*" hyperlink under "**Service Providers: Application of Funds**"

   *Note: The "Service Provider Firm Add -<Project Name>" page opens*




3. Change details
4. Click on the OK button

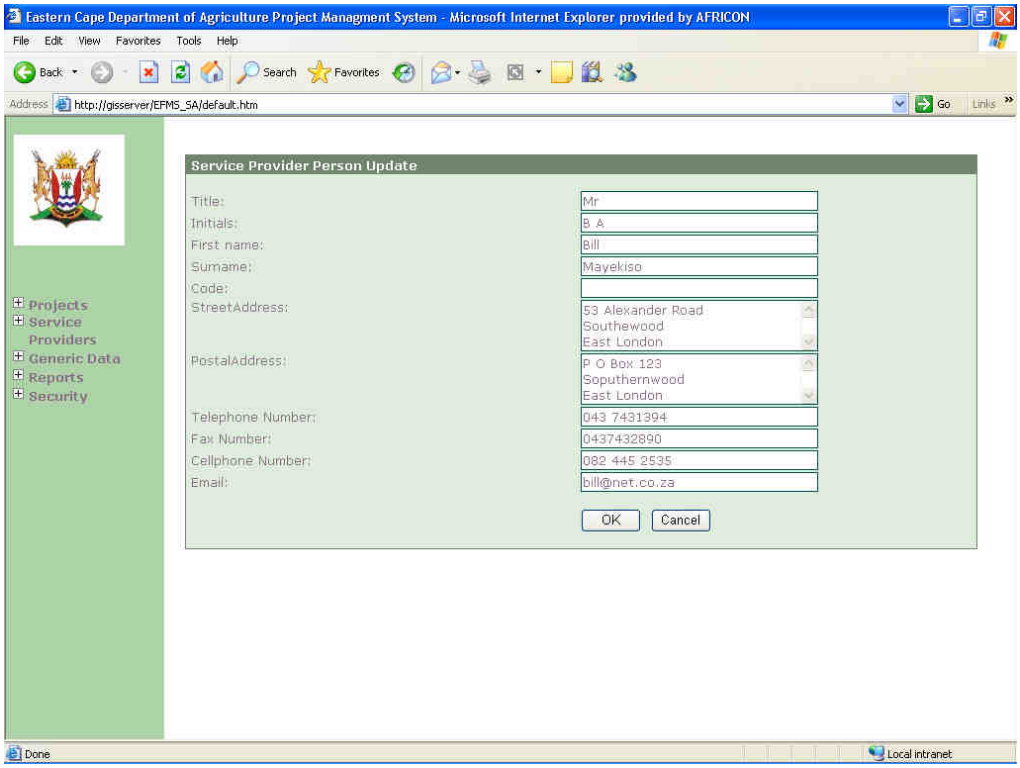
   *Note: Revised Service Provider Details are displayed on the "Project <Name>" page*

### 3.11.1.1 Editing details for a Service Provider Contact Person

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Contact name*" hyperlink under "**Service Providers: Application of Funds**"

   *Note: The "Service Provider Person>" page opens*
3. Click on the "*Edit*" hyperlink

   *Note: The "Service Provider Person Update>" page opens*




4. Change details
5. Click on the OK button

   *Note: Revised Service Provider Person contact details are displayed on the "Project <Name>" page*

### 3.11.1.2 Removing a Service Provider from a Project

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Remove*" hyperlink next to Service Provider name, under "**Service Providers: Application of Funds**"

   *Note: The system prompts you to confirm deletion*
3. Click on the YES button

   *Note: Service Provider is deleted from list*

## 3.12 Claims

### 3.12.1 Viewing a Summary of Claims made by Contractors and Consultants

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Claims*" hyperlink under "Category Data"

   *Note: The "Claims -<Project Name>" page opens*
3. Click on the "*View Summary*" hyperlink

   *Note: The "Service Providers > Claims Summary -<Project Name>" page opens, displaying amount paid to Contractors and Consultants*

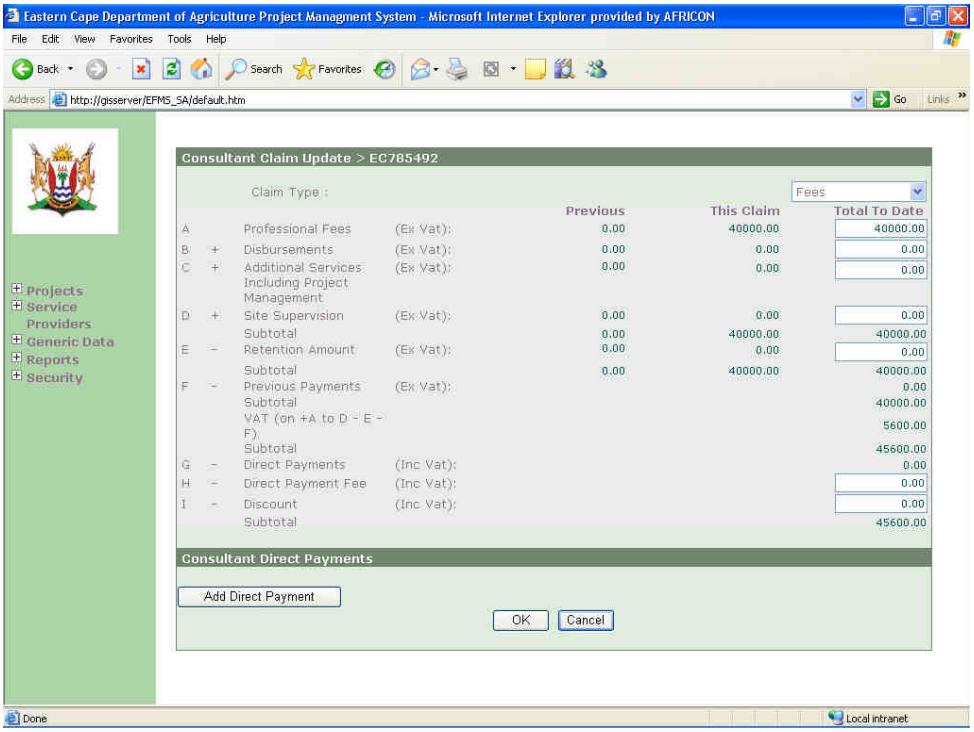
### 3.12.2 Adding a Claim made by a Contractor or a Consultant

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Claims*" hyperlink under "Category Data"

   *Note: The "Claims -<Project Name>" page opens*
3. Select the Claim Type, Service Provider and Funding Source from the drop-down lists
4. Click on the SUBMIT button

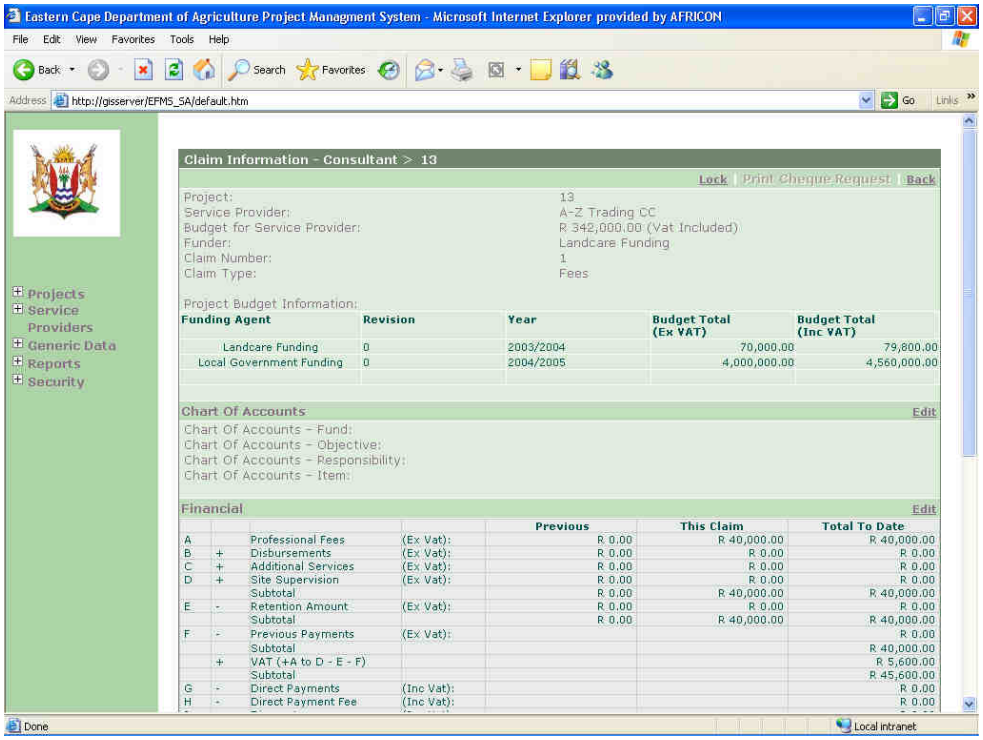
   *Note: The "Consultant/Contractor Claims -<Project Name>" page opens*
5. Click on the "*Add*" hyperlink

   *Note: The "Consultant/Contractor Claim Update-<Project Name>" page opens*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Consultant Claim Update > EC785492
Claim Type : Fees
Previous This Claim Total To Date
A Professional Fees (Ex Vat): 0.00 40000.00 40000.00
B + Disbursements (Ex Vat): 0.00 0.00 0.00
C + Additional Services Including Project Management (Ex Vat): 0.00 0.00 0.00
D + Site Supervision (Ex Vat): 0.00 0.00 0.00
Subtotal 0.00 40000.00 40000.00
E - Retention Amount (Ex Vat): 0.00 0.00 0.00
Subtotal 0.00 40000.00 40000.00
F - Previous Payments (Ex Vat): 0.00
Subtotal 40000.00
VAT (on +A to D - E - F) 5600.00
Subtotal 45600.00
G - Direct Payments (Inc Vat): 0.00
H - Direct Payment Fee (Inc Vat): 0.00
I - Discount (Inc Vat): 0.00
Subtotal 45600.00
Consultant Direct Payments
Add Direct Payment
OK Cancel
Done
Local intranet

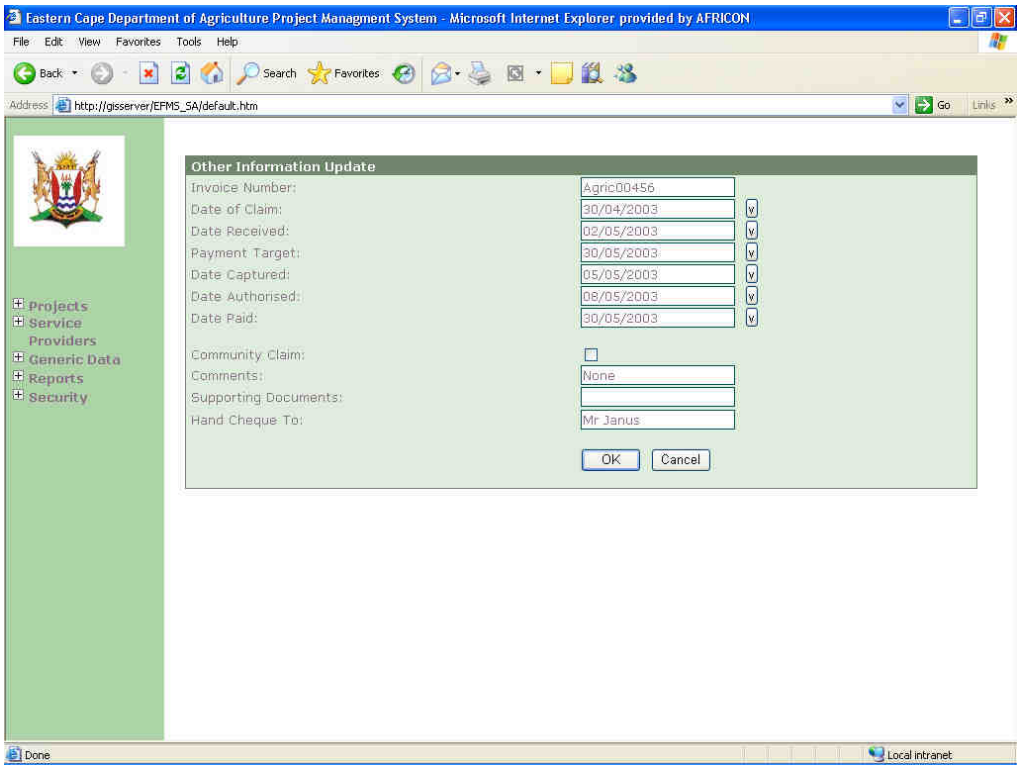
6. Enter amounts claimed in relevant text boxes
7. Click on the OK button

   *Note: The "Claim Information - Consultant/Contractor -<Project Name>" page opens*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Claim Information - Consultant > 13
Lock | Print Cheque Request | Back
Project: 13
Service Provider: A-Z Trading CC
Budget for Service Provider: R 342,000.00 (Vat Included)
Funder: Landcare Funding
Claim Number: 1
Claim Type: Fees
Project Budget Information:
Funding Agent | Revision | Year | Budget Total (Ex VAT) | Budget Total (Inc VAT)
Landcare Funding | 0 | 2003/2004 | 70,000.00 | 79,800.00
Local Government Funding | 0 | 2004/2005 | 4,000,000.00 | 4,560,000.00
Chart Of Accounts Edit
Chart Of Accounts - Fund:
Chart Of Accounts - Objective:
Chart Of Accounts - Responsibility:
Chart Of Accounts - Item:
Financial Edit
Previous | This Claim | Total To Date
A Professional Fees (Ex Vat): R 0.00 R 40,000.00 R 40,000.00
B + Disbursements (Ex Vat): R 0.00 R 0.00 R 0.00
C + Additional Services (Ex Vat): R 0.00 R 0.00 R 0.00
D + Site Supervision (Ex Vat): R 0.00 R 0.00 R 0.00
Subtotal R 0.00 R 40,000.00 R 40,000.00
E - Retention Amount (Ex Vat): R 0.00 R 0.00 R 0.00
Subtotal R 0.00 R 40,000.00 R 40,000.00
F - Previous Payments (Ex Vat): R 0.00
Subtotal R 40,000.00
+ VAT (+A to D - E - F) R 5,600.00
Subtotal R 45,600.00
G - Direct Payments (Inc Vat): R 0.00
H - Direct Payment Fee (Inc Vat): R 0.00
Done
Local intranet

8. Click on the "*Edit*" hyperlink next to "**Other**"

*Note: The "Other Information Update" page opens*



9. Enter applicable Invoice information
10. Click on the OK button

    *Note: Invoice information is displayed on the "Claim Information - Consultant/Contractor -<Project Name>" page*

### 3.12.2.1 Editing Claim Information

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Claims*" hyperlink under "Category Data"

    *Note: The "Claims -<Project Name>" page opens*
3. Select the Claim Type, Service Provider and Funding Source from the drop-down lists
4. Click on the SUBMIT button

    *Note: The "Consultant/Contractor Claims -<Project Name>" page opens, listing claims per number*
5. Click on the desired "*Claim number"* hyperlink

    *Note: The "Claim Information - Consultant/Contractor -<Project Name>" page opens*
6. Click on the "*Edit*" hyperlink next "**Other**" group

    *Note: The "Other Information Update" page opens*
7. Change Invoice information as required
8. Click on the OK button

    *Note: Revised information is displayed on the "Claim Information - Consultant/Contractor -<Project Name>" page*

### 3.12.2.2 Editing Financial Claim Information for a Contractor or Consultant

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Claims*" hyperlink under "Category Data"

    *Note: The "Claims -<Project Name>" page opens*

3. Select the Claim Type, Service Provider and Funding Source from the drop-down lists
4. Click on the SUBMIT button

   *Note: The "Consultant/Contractor Claims -<Project Name>" page opens, listing claims per number*
5. Click on the desired "*Claim number*" hyperlink

   *Note: The "Claim Information - Consultant/Contractor -<Project Name>" page opens*
6. Click on the "*Edit*" hyperlink next "**Financial**" group

   *Note: The "Consultant/Contractor Claim Update -<Project Name>" page opens*
7. Modify figures as desired
8. Click on the OK button

   *Note: Revised amounts are displayed on the "Claim Information - Consultant/Contractor -<Project Name>" page*

### 3.12.3 Requesting a Direct Payment for a Contractor or Consultant

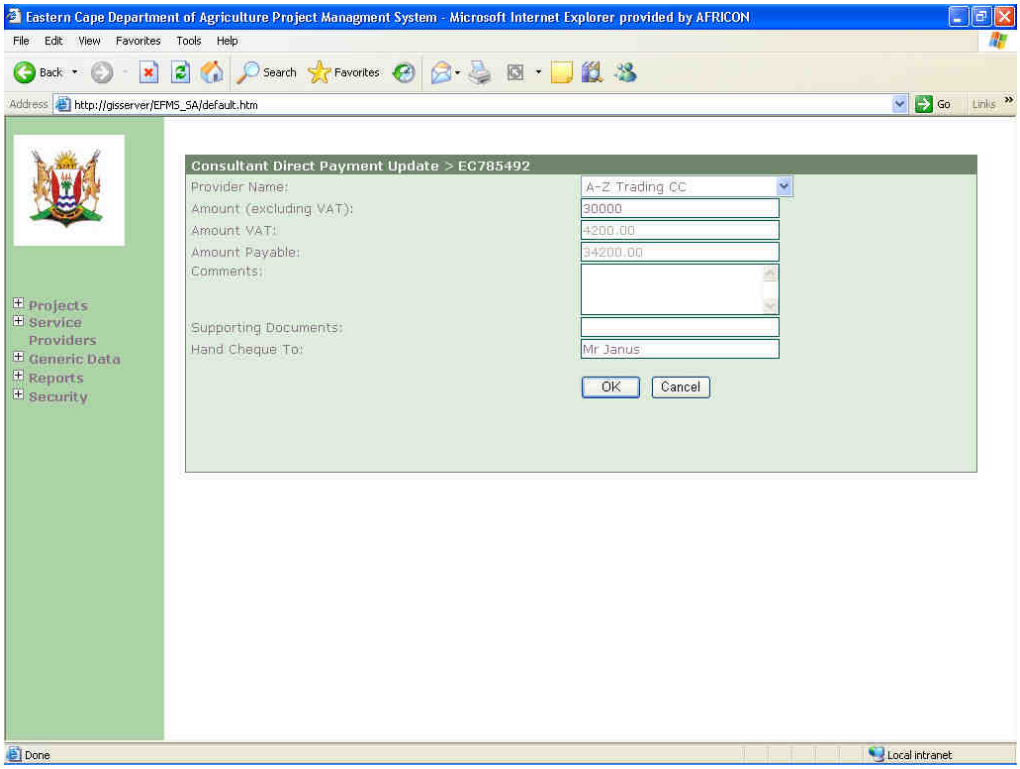
1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Claims*" hyperlink under "Category Data"

   *Note: The "Claims -<Project Name>" page opens*
3. Select the Claim Type, Service Provider and Funding Source from the drop-down lists
4. Click on the SUBMIT button

   *Note: The "Consultant/Contractor Claims -<Project Name>" page opens, listing claims per number*
5. Click on the desired "*Claim number*" hyperlink

   *Note: The "Claim Information - Consultant/Contractor -<Project Name>" page opens*
6. Click on the "*Add*" hyperlink next to "**Direct Payments**"

*Note: The "Consultant/Contractor Direct Payment Update -<Project Name>" page opens*




7. Enter relevant information
8. Click on the OK button

   *Note: The "Claim Information - Consultant/Contractor -<Project Name>" page displays Direct Payment information*

### 3.12.3.1 Editing Direct Payment Request Information

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Claims*" hyperlink under "Category Data"

   *Note: The "Claims -<Project Name>" page opens*
3. Select the Claim Type, Service Provider and Funding Source from the drop-down lists
4. Click on the SUBMIT button

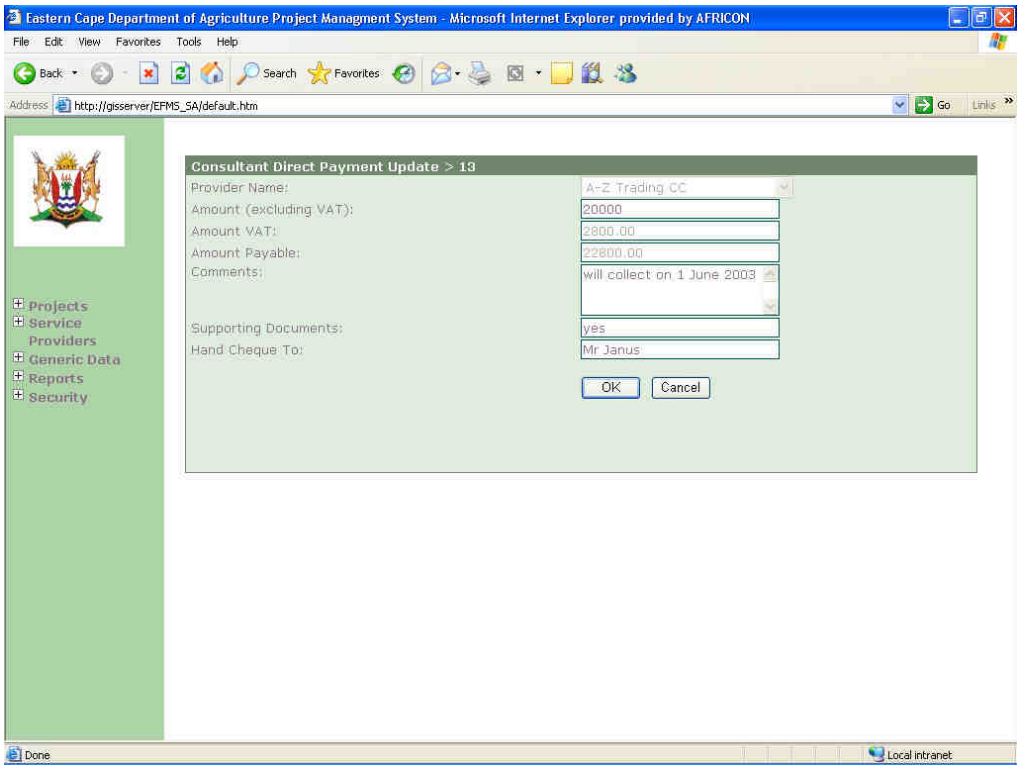
*Note: The "Consultant/Contractor Claims -<Project Name>" page opens, listing claims per number*

5. Click on the desired "*Claim number*" hyperlink

   *Note: The "Claim Information - Consultant/Contractor -<Project Name>" page opens*

6. Click on the "*Edit*" hyperlink next to "**Consultant/Contractor**" name

   *Note: The "Consultant/Contractor Direct Payment Update" page opens*




7. Change information
8. Click on the OK button

   *Note: Revised details are displayed on the "Claim Information - Consultant/Contractor -<Project Name>" page*

***Direct the printed copy to Finance section personnel for further processing.***

### 3.12.4 Locking/unlocking Claim information for a Contractor or Consultant

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Claims*" hyperlink under "Category Data"

   *Note: The "Claims -<Project Name>" page opens*
3. Select the Claim Type, Service Provider and Funding Source from the drop-down lists
4. Click on the SUBMIT button

   *Note: The "Consultant/Contractor Claims -<Project Name>" page opens, listing claims per number*
5. Click on the desired "*Claim number"* hyperlink

   *Note: The "Claim Information - Consultant/Contractor -<Project Name>" page opens*
6. Click on the "*Lock*" or "*Unlock*" hyperlink

   *Note: "Claim Information" page is locked for editing/unlocked for editing*

***Only a user with appropriate Rights can lock or unlock Claim information.***

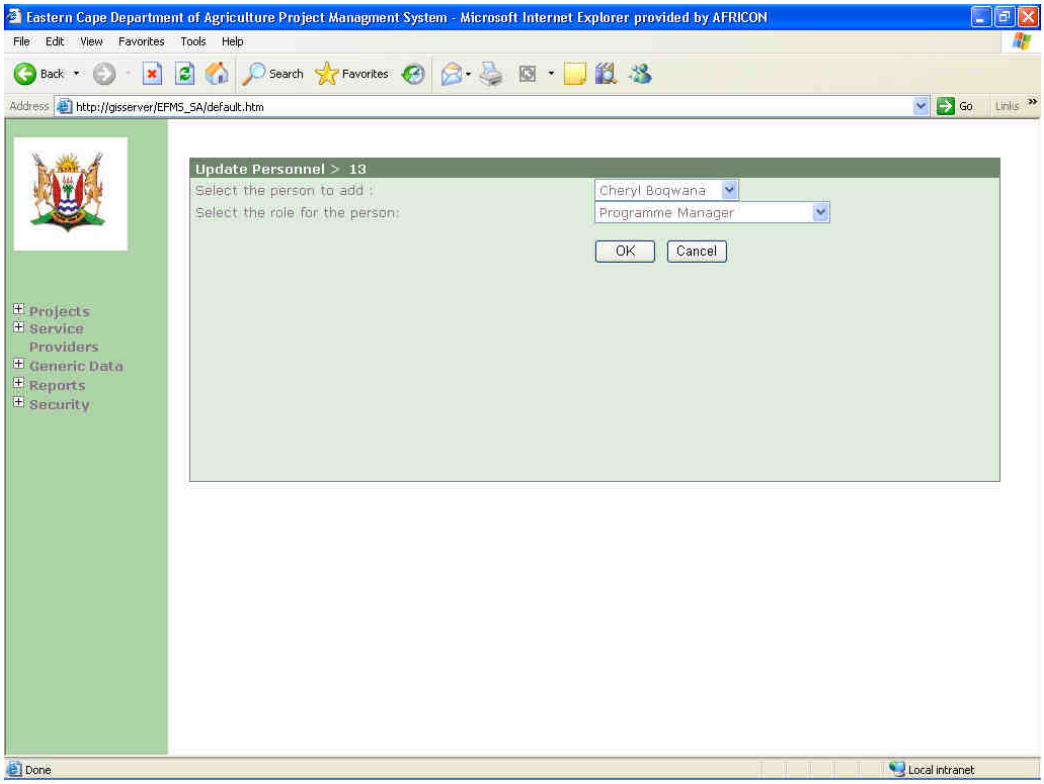
## 3.13 Project Personnel

### 3.13.1 Adding Project Personnel

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "**Project Personnel**"

   *Note: The "Project Personnel -<Project Number>" page opens*
3. Click on the "*Add*" hyperlink

   *Note: The "Update Project Personnel -<Project Number" page opens*




4. Enter information
5. Click on the OK button

   *Note: Personnel details are displayed on the "Project Personnel - <Project Number>" page*

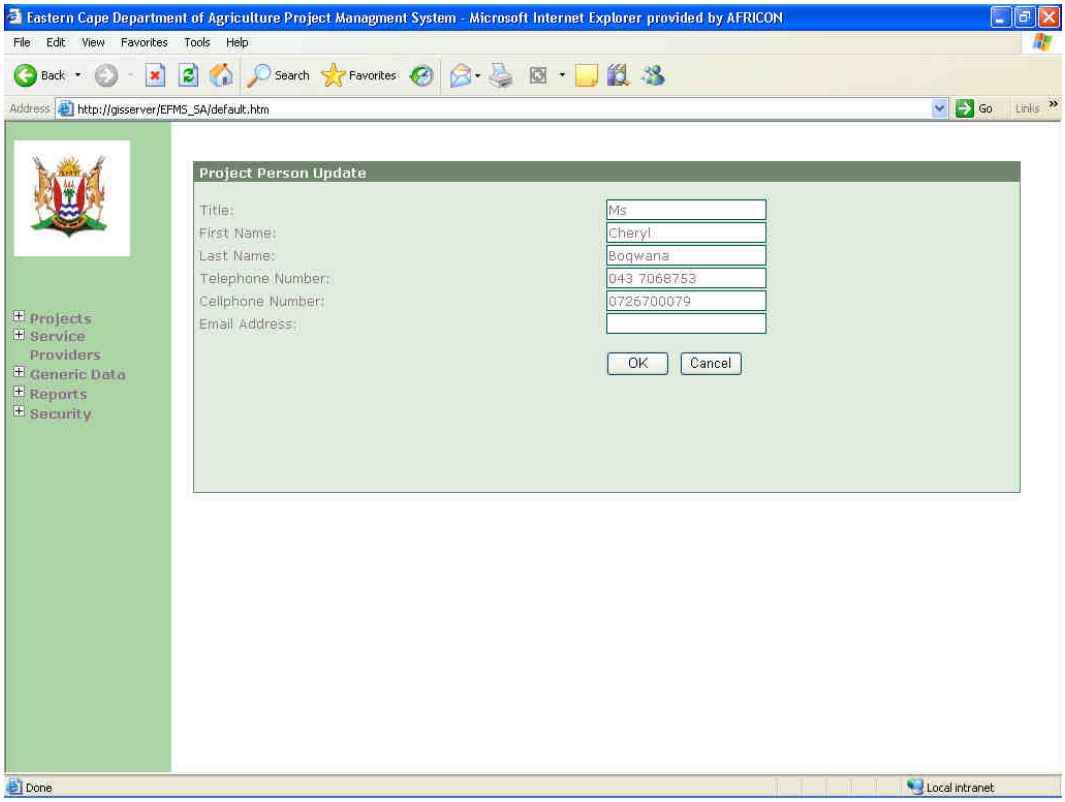
***Personnel can only be added here if they have already been added in the generic table as described in section 3.17.***

## 3.13.2 Editing Project Personnel Details

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Personnel Name*" hyperlink under "**Project Personnel**"

   *Note: The "Project Personnel" page opens*
3. Click on the "*Edit*" hyperlink

   *Note: The "Project Person Update" page opens*




4. Make desired changes
5. Click on the OK button

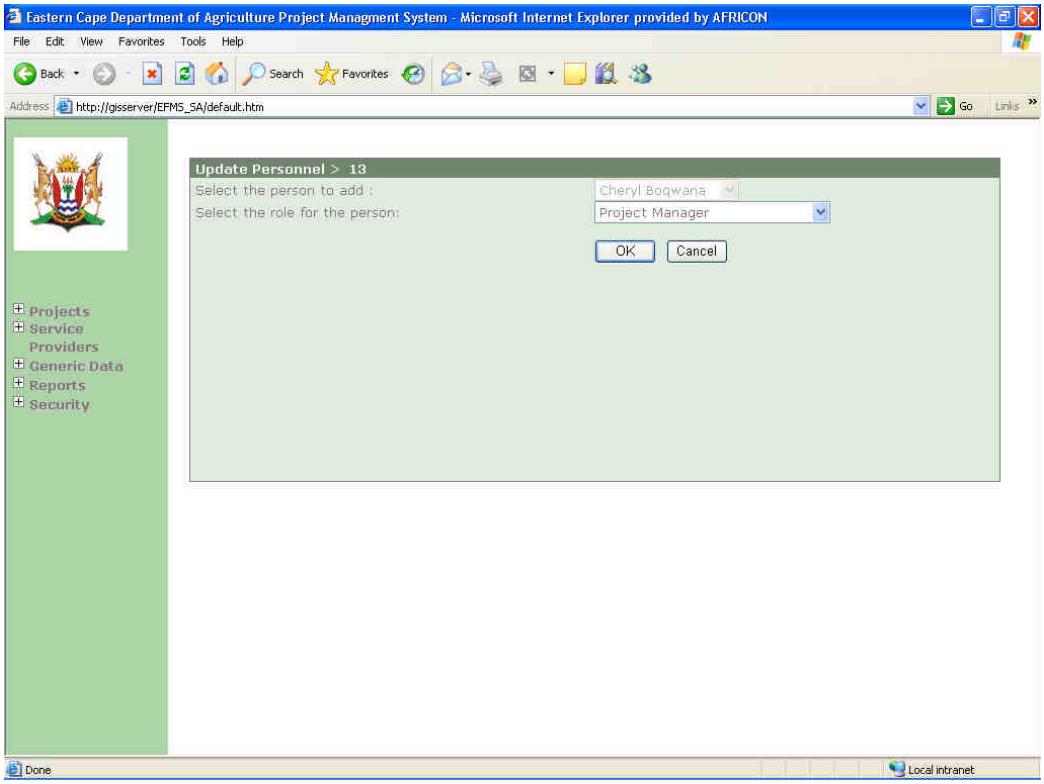
   *Note: Revised information is displayed on the "Project Personnel" page*

### 3.13.3 Editing Roles for Project Personnel

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "**Project Personnel**"

   *Note: The "Project Personnel -<Project Number>" page opens*
3. Click on the "*Edit Role*" hyperlink next to person's name

   *Note: The "Update Personnel -<Project Number" page opens*




4. Change role details
5. Click on the OK button

   *Note: Revised role is displayed on "Project Personnel -<Project Number>" page*

### 3.13.4 Removing Project Personnel

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "**Project Personnel**"

   *Note: The "Project Personnel -<Project Number>" page opens*
3. Click on the "*Remove*" hyperlink next to person's name

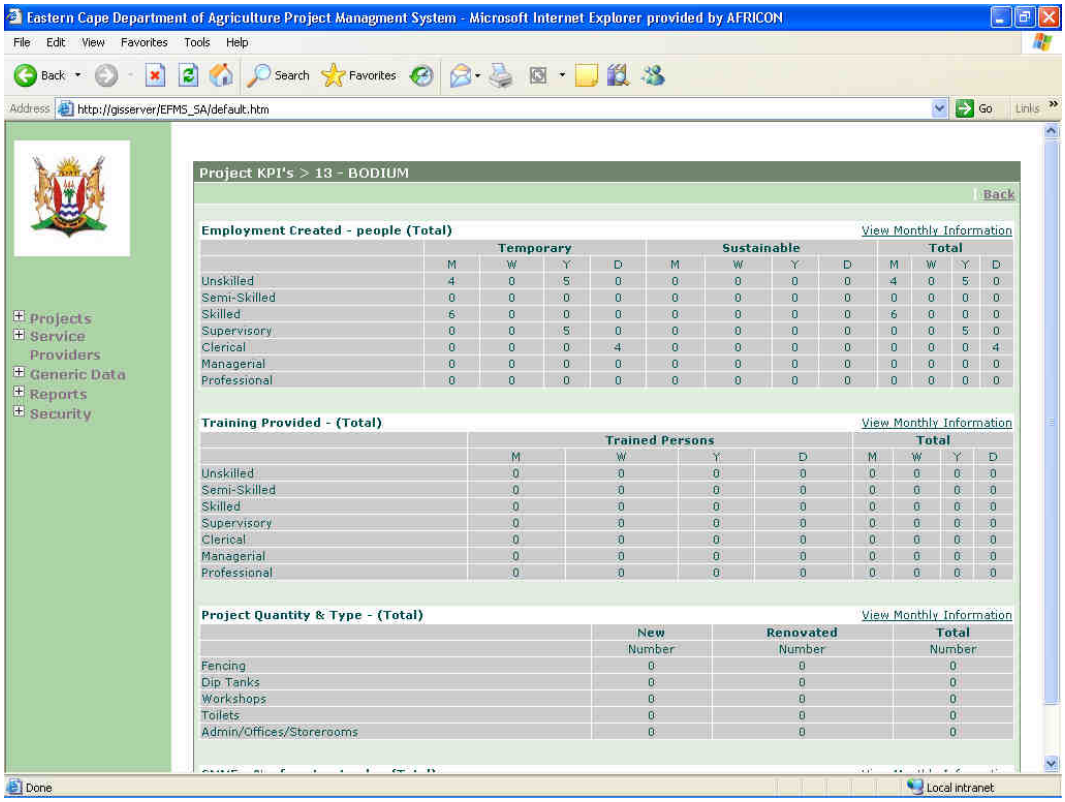
   *Note: The Name is removed from Project Personnel list*

## 3.14 KPIs

### 3.14.1 Adding KPI employment statistics for a Project

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*KPI's*" hyperlink under "Category Data"

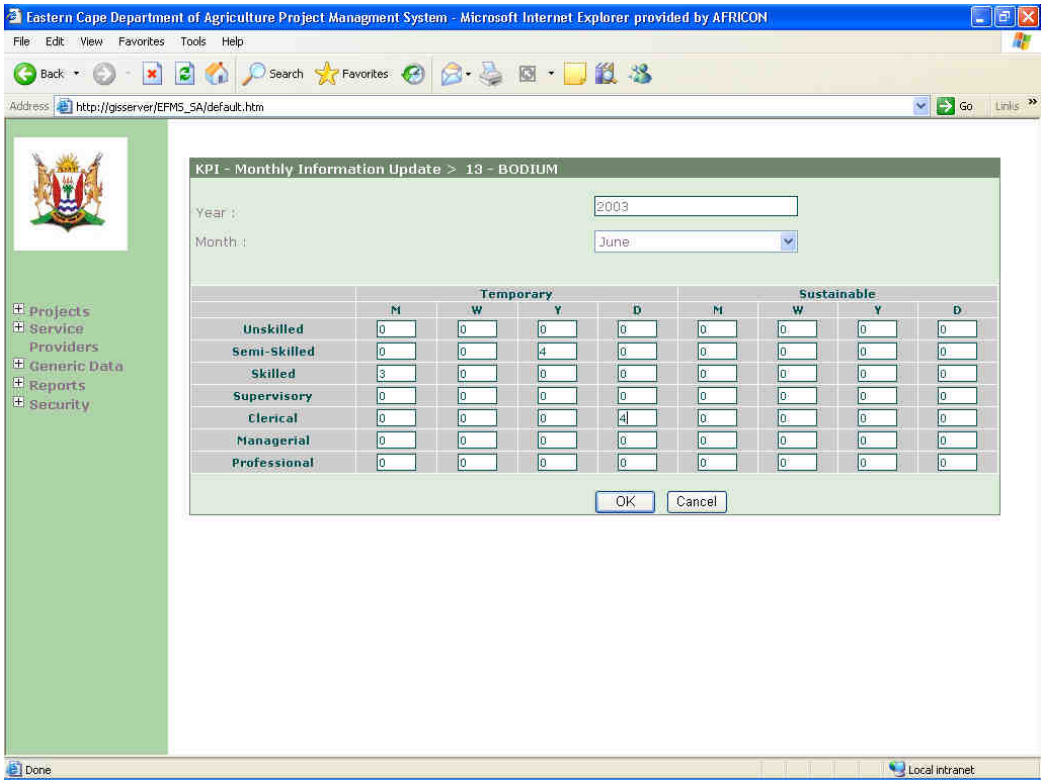
   *Note: The "Project KPI's -<Project Name>" page opens, displaying Project KPI's*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Project KPI's > 13 - BODIUM
Back
Employment Created - people (Total)
View Monthly Information
Temporary Sustainable Total
M W Y D M W Y D M W Y D
Unskilled 4 0 5 0 0 0 0 0 4 0 5 0
Semi-Skilled 0 0 0 0 0 0 0 0 0 0 0 0
Skilled 6 0 0 0 0 0 0 0 6 0 0 0
Supervisory 0 0 5 0 0 0 0 0 0 0 5 0
Clerical 0 0 0 4 0 0 0 0 0 0 0 4
Managerial 0 0 0 0 0 0 0 0 0 0 0 0
Professional 0 0 0 0 0 0 0 0 0 0 0 0
Training Provided - (Total)
View Monthly Information
Trained Persons Total
M W Y D M W Y D
Unskilled 0 0 0 0 0 0 0 0
Semi-Skilled 0 0 0 0 0 0 0 0
Skilled 0 0 0 0 0 0 0 0
Supervisory 0 0 0 0 0 0 0 0
Clerical 0 0 0 0 0 0 0 0
Managerial 0 0 0 0 0 0 0 0
Professional 0 0 0 0 0 0 0 0
Project Quantity & Type - (Total)
View Monthly Information
New Renovated Total
Number Number Number
Fencing 0 0 0
Dip Tanks 0 0 0
Workshops 0 0 0
Toilets 0 0 0
Admin/Offices/Storerooms 0 0 0
Done
Local intranet

3. Click on the "*View monthly information*" hyperlink under "Employment Created – people".

4. Click on "*Add monthly information*" hyperlink

   *Note: The "KPI Monthly information Update -<Project Name>" page opens*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://gisserver/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
KPI - Monthly Information Update > 13 - BODIUM
Year : 2003
Month : June
Temporary
Sustainable
M W Y D M W Y D
Unskilled 0 0 0 0 0 0 0 0
Semi-Skilled 0 0 4 0 0 0 0 0
Skilled 3 0 0 0 0 0 0 0
Supervisory 0 0 0 0 0 0 0 0
Clerical 0 0 0 4 0 0 0 0
Managerial 0 0 0 0 0 0 0 0
Professional 0 0 0 0 0 0 0 0
OK Cancel
Done
Local intranet

5. Enter applicable information
6. Click on the OK button

   *Note: Staff statistics are displayed on the "Project Staff -<Project Name>" page*

## 3.14.2 Adding KPI training statistics for a Project

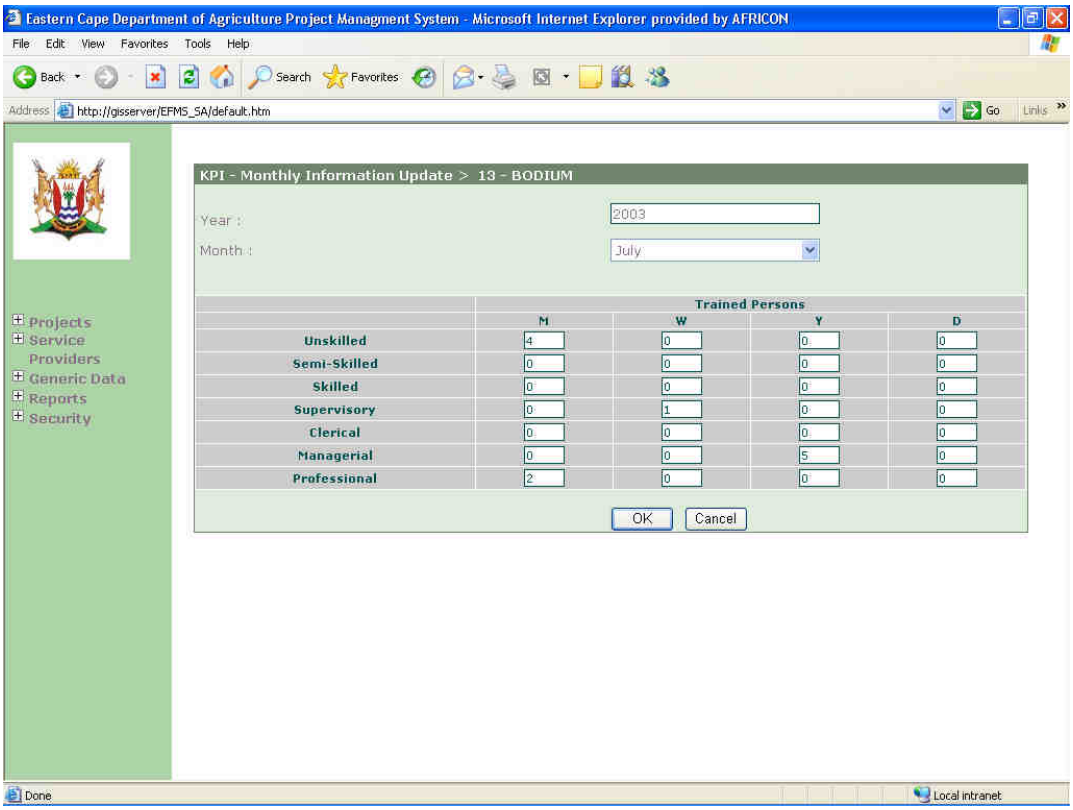
1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*KPI's*" hyperlink under "Category Data"

   *Note: The "Project KPI's -<Project Name>" page opens, displaying Project KPI's*

*3.* Click on the "*View monthly information*" hyperlink under "*Training Provided".*

4. Click on "*Add monthly information*" hyperlink

   *Note: The "KPI Monthly information Update -<Project Name>" page opens*




5. Enter applicable information
6. Click on the OK button

   *Note: Training provided statistics are displayed on the "KPI Monthly information -<Project Name>" page*

### 3.14.3 Viewing KPI Details per project

1. Open the *"Project <Name>"* page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*KPI's*" hyperlink under "Category Data"

   *Note: The "Project KPI -<Project Name>" page opens, displaying the totals of all the different KPI's under the project*

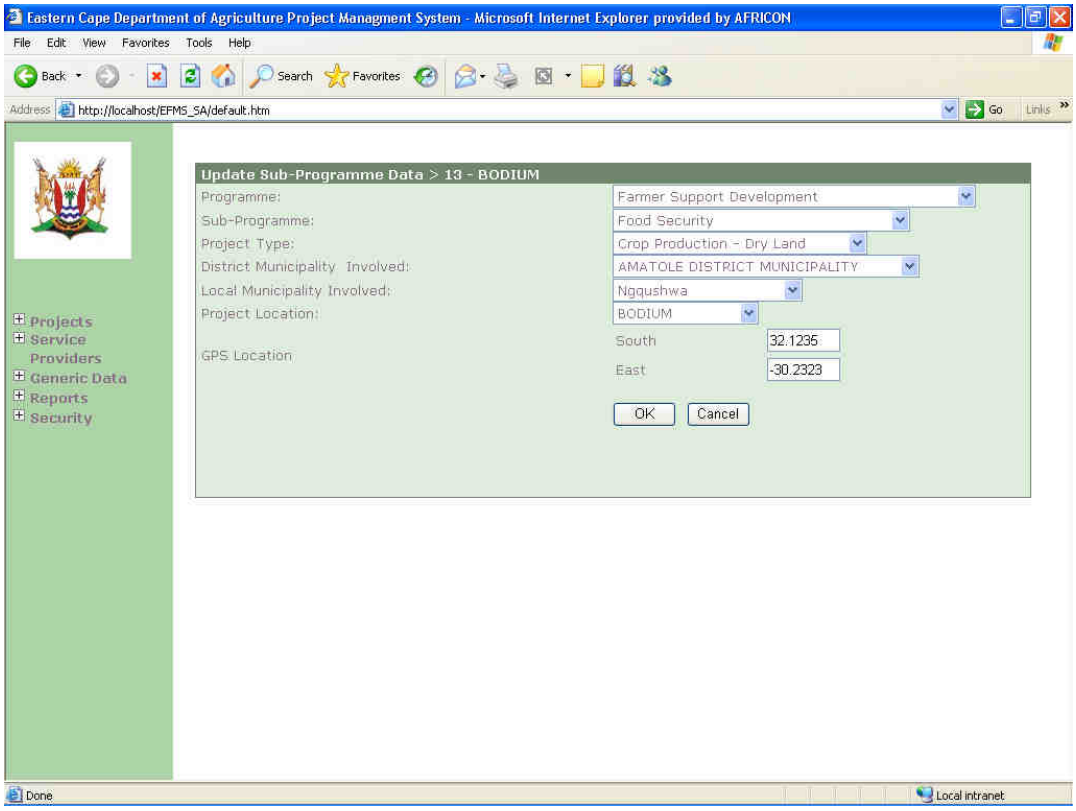
***Project Quantity and SMME KPI's are added the same as under 8.15.1 and 8.15.2***

## 3.15 Editing Project Information

### 3.15.1 Editing Category Data

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "Category Data"

   *Note: The "Update Category Data -<Project Number" page opens*



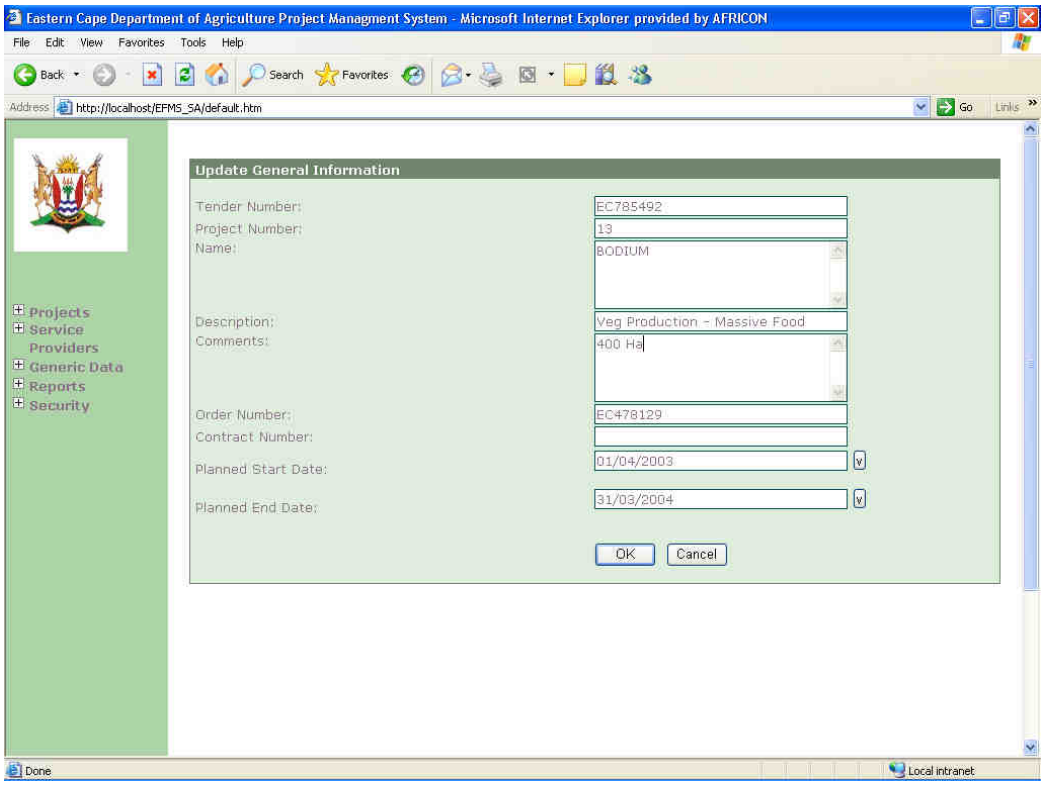

3. Modify information
4. Click on the OK button

   *Note: Revised information is displayed on the "Project <Name>" page*

### 3.15.2 Editing General Information

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "General Information"

*Note: The "Update General Information -<Project Number" page opens*




3. Modify information
4. Click on the OK button

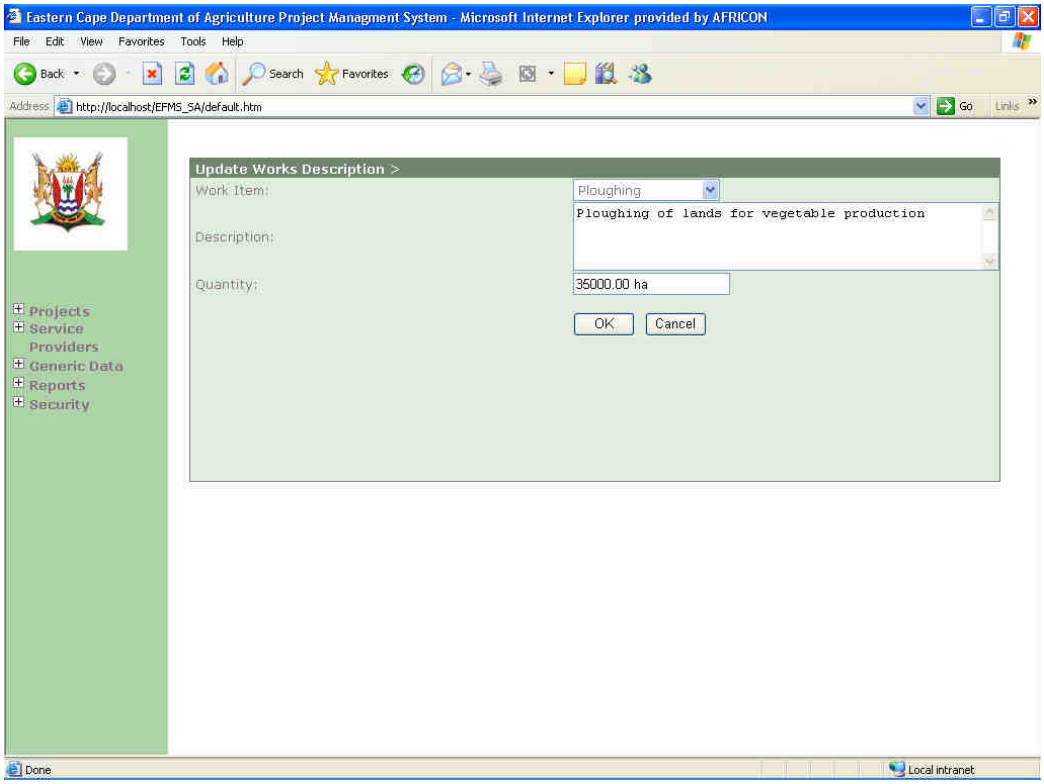
   *Note: Revised information is displayed on the "Project <Name>" page*

### 3.15.3 Updating Works Description

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "Works Description"

   *Note: The "Project Works" -<Project Number" page opens*
3. Click on the "*Add*" hyperlink

   *Note: The "Update Project Description" -<Project Number" page opens*



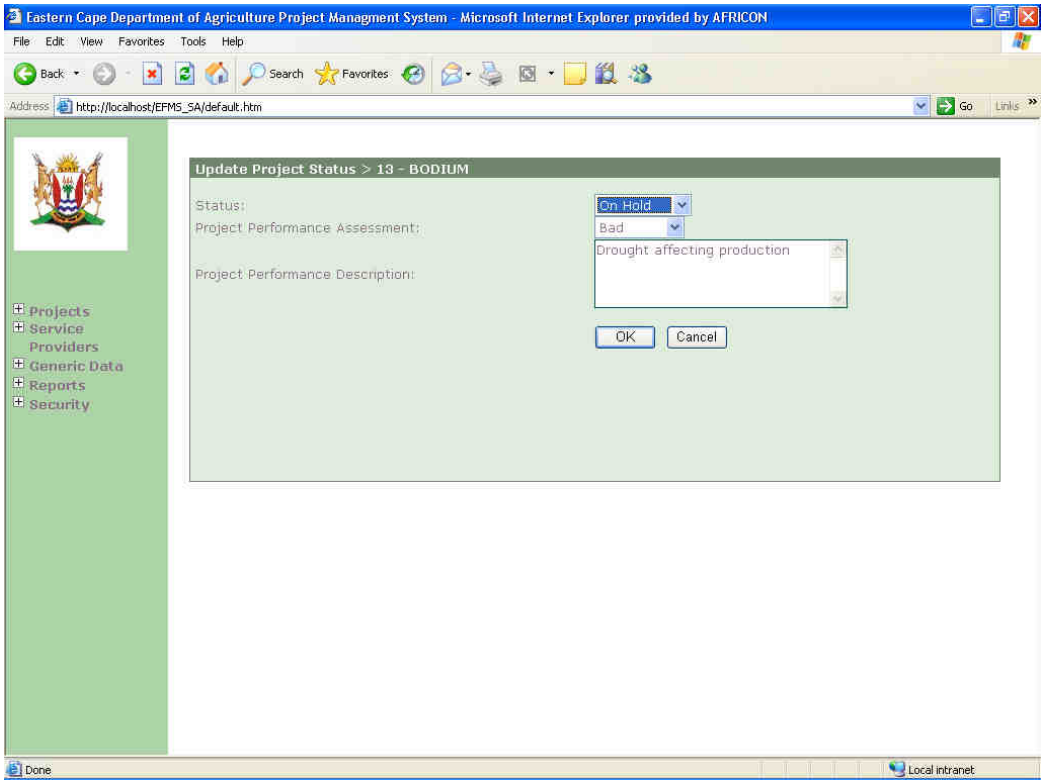

4. Modify information
5. Click on the OK button

*Note: Revised information is displayed on the "Project <Name>" page*

## 3.15.4 Updating Project Status

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "Project Status"

*Note: The "Update Project Status -<Project Number" page opens*



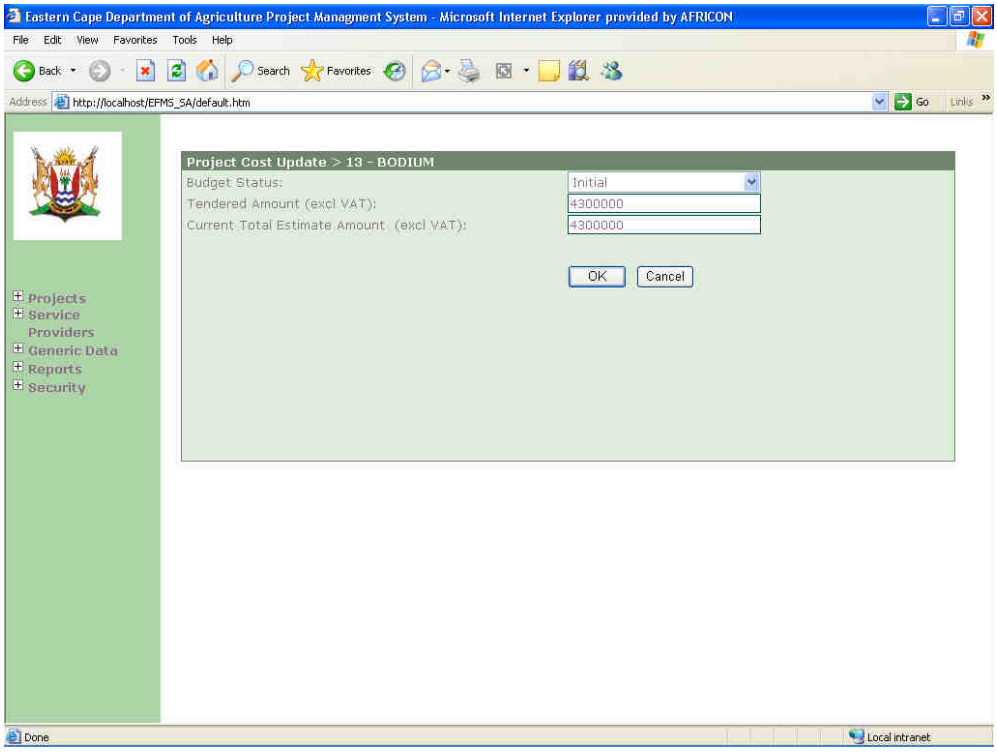

3. Modify information
4. Click on the OK button

   *Note: Revised information is displayed on the "Project <Name>" page*

### 3.15.5 Updating Project Costs

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "Project Costs: Funds Applied"

   *Note: The "Update Project Costs -<Project Number" page opens*



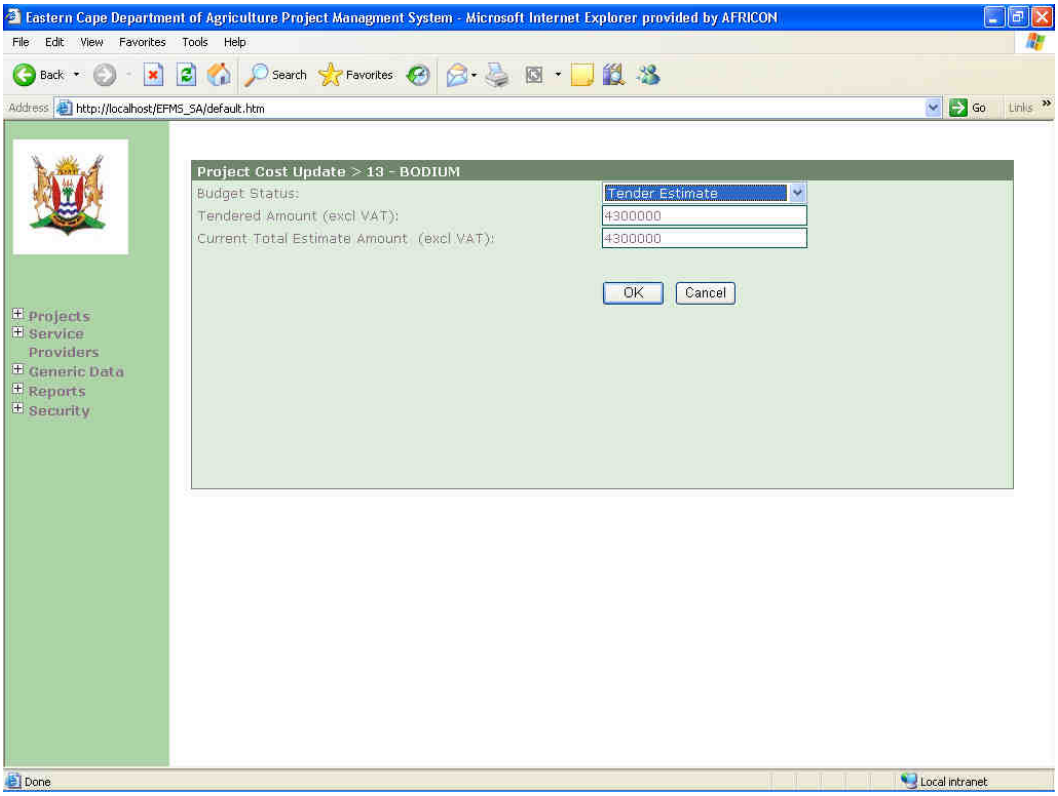

3. Modify information
4. Click on the OK button

   *Note: Revised information is displayed on the "Project <Name>" page*

### 3.15.6 Updating Budget Status

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Edit*" hyperlink next to "Project Costs: Funds Applied"

   *Note: The "Project Cost Update -<Project Number" page opens*



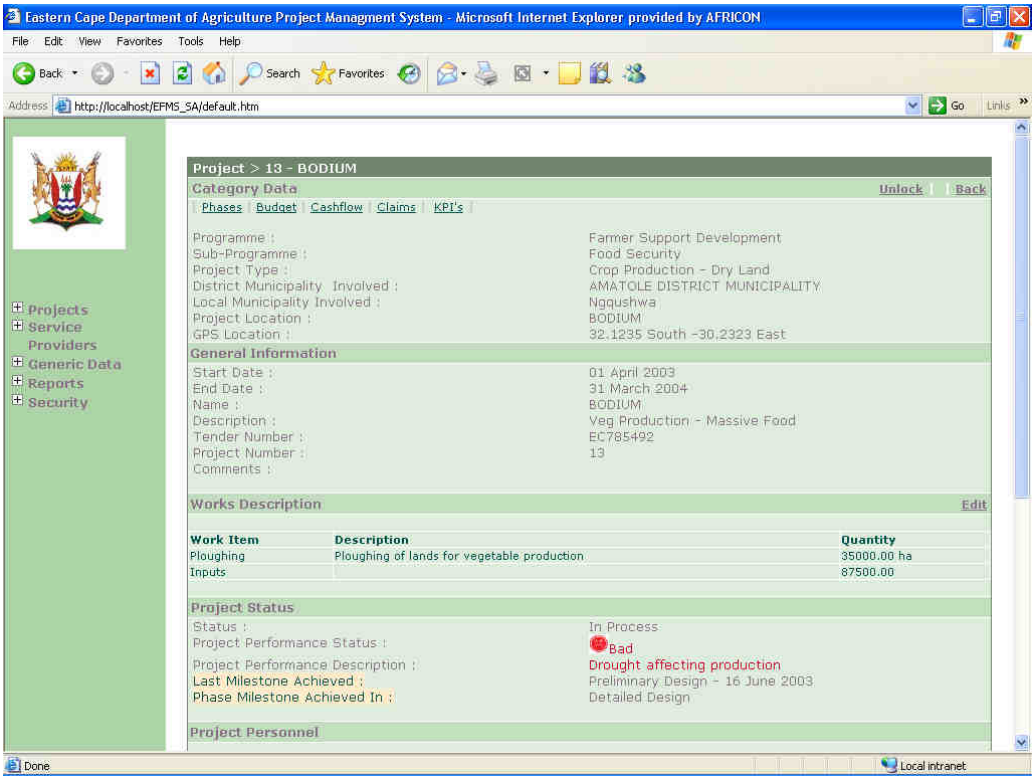

3. Modify information
4. Click on the OK button

   *Note: Revised information is displayed on the "Project <Name>" page*

## 3.16 Locking Project Information

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Lock*" hyperlink next to "Category Data"

   *Note: Information is locked for editing*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://localhost/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
Security
Project > 13 - BODIUM
Category Data
Unlock | Back
Phases | Budget | Cashflow | Claims | KPI's
Programme : Farmer Support Development
Sub-Programme : Food Security
Project Type : Crop Production - Dry Land
District Municipality Involved : AMATOLE DISTRICT MUNICIPALITY
Local Municipality Involved : Nggushwa
Project Location : BODIUM
GPS Location : 32.1235 South -30.2323 East
General Information
Start Date : 01 April 2003
End Date : 31 March 2004
Name : BODIUM
Description : Veg Production - Massive Food
Tender Number : EC785492
Project Number : 13
Comments :
Works Description
Edit
Work Item | Description | Quantity
Ploughing | Ploughing of lands for vegetable production | 35000.00 ha
Inputs | | 87500.00
Project Status
Status : In Process
Project Performance Status : Bad
Project Performance Description : Drought affecting production
Last Milestone Achieved : Preliminary Design - 16 June 2003
Phase Milestone Achieved In : Detailed Design
Project Personnel
Done
Local intranet

### 3.16.1 Unlocking Project Information

1. Open the "*Project <Name>*" page as described in 3.3 or search for project as described in 3.4 above
2. Click on the "*Unlock*" hyperlink next to "Category Data"

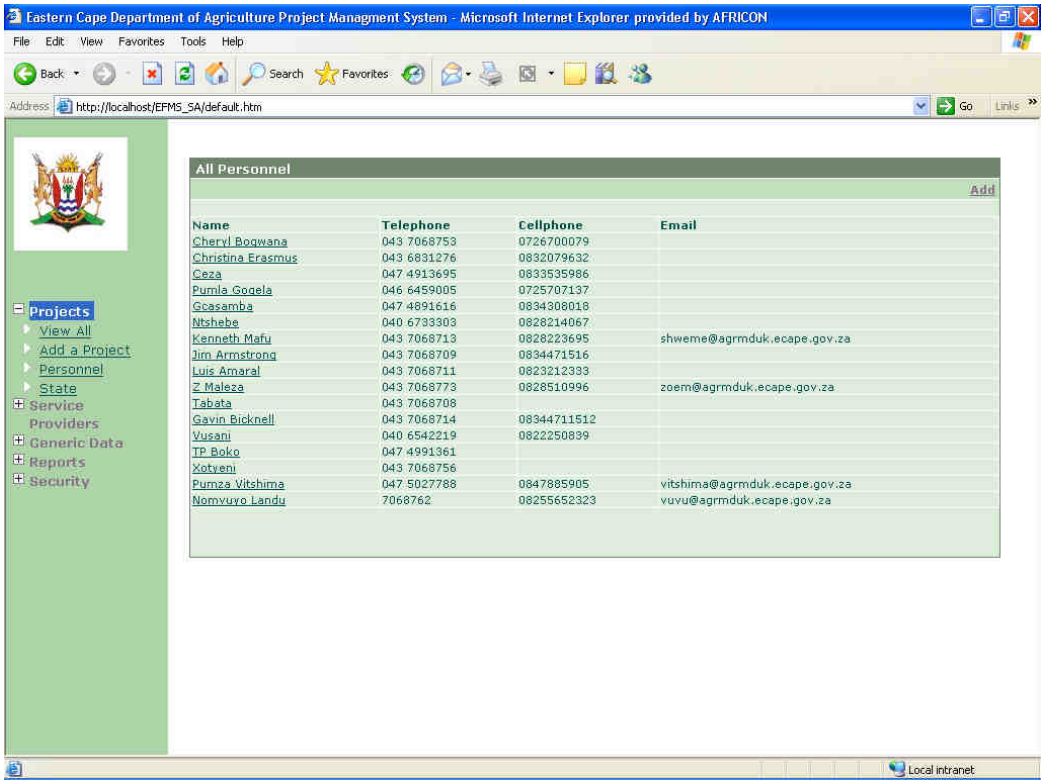
   *Note: Information is unlocked and can be edited*

## 3.17 Personnel

***Once personnel have been listed in this generic table, they can be added to projects as shown in section 3.13.1***

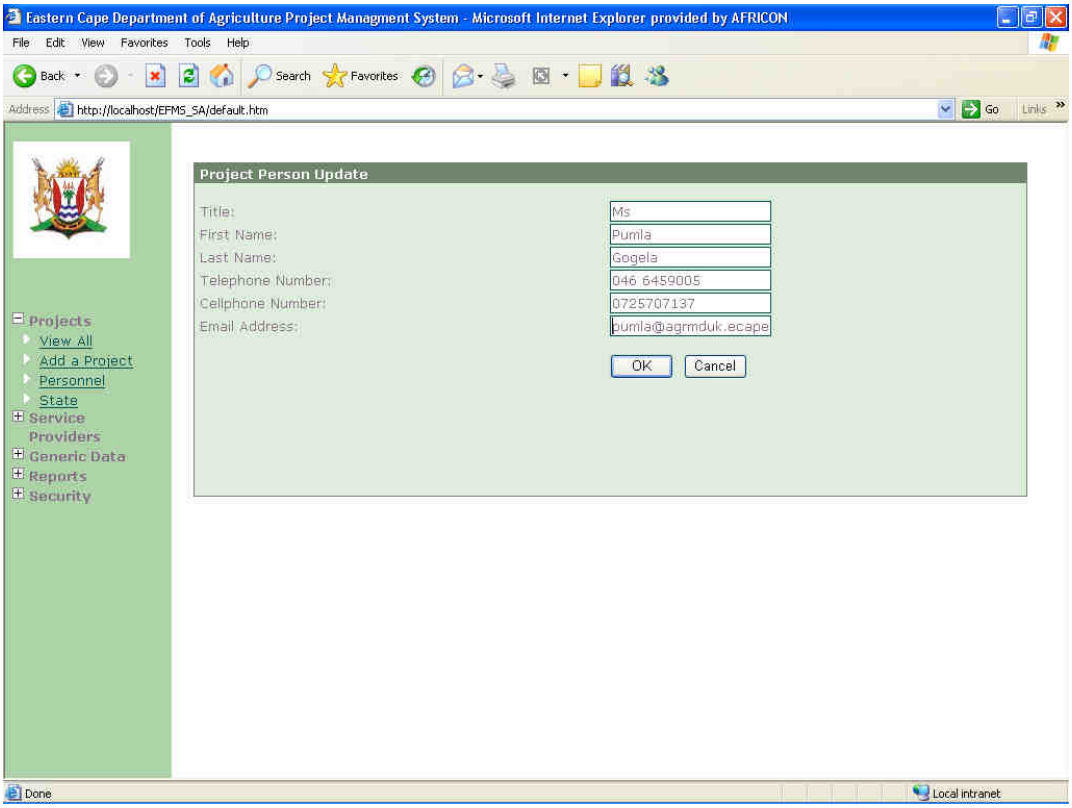
1. Expand ***Projects*** on the Menu Bar and click on the "*Personnel*" hyperlink

   *Note: The "All Personnel" page opens*




2. Click on the "*Add*" hyperlink

   *Note: The "Project Person Update" page opens*




3. Enter details
4. Click on the OK button

   *Note: New Personnel details are displayed on the "All Personnel" page*

### 3.17.1 Editing Personnel details

1. Expand ***Projects*** on the Menu Bar and click on the "*Personnel*" hyperlink

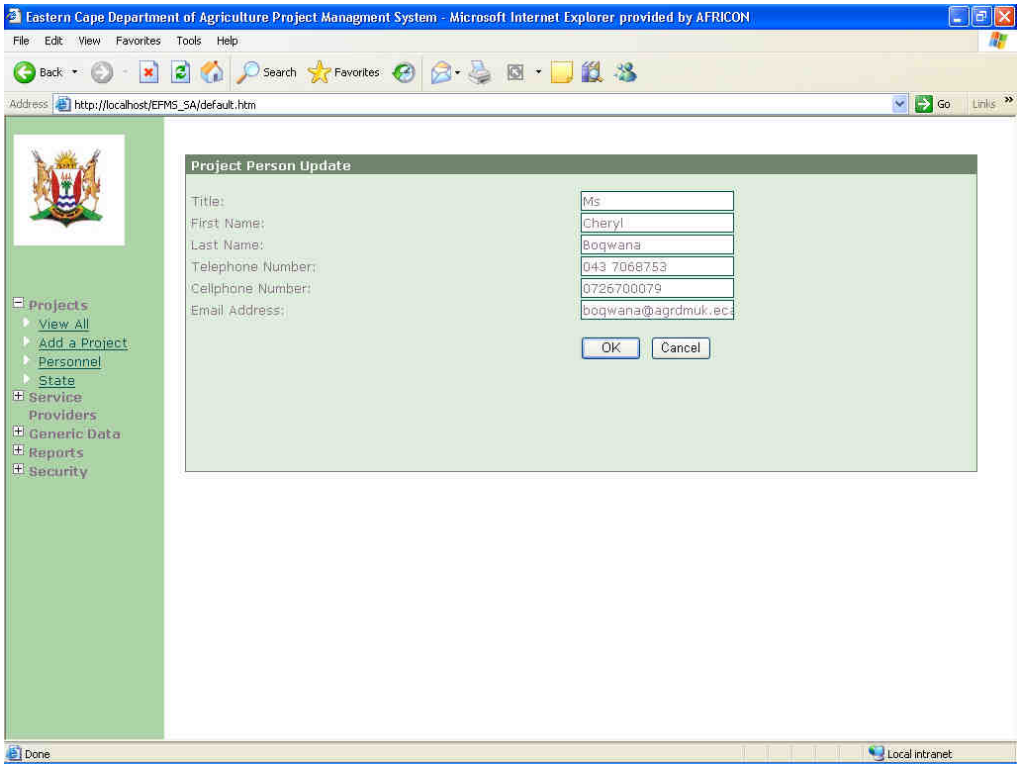
   *Note: The "All Personnel" page opens*

2. Click on the desired "*Personnel Name*" hyperlink

   *Note: The "Project Personnel" page opens*

3. Click on the "*Edit*" hyperlink

   *Note: The "Project Person Update" page opens*




4. Make desired changes
5. Click on the OK button

   *Note: Revised Personnel details are displayed on the "All Personnel" page*

## 3.18 Changing Project State

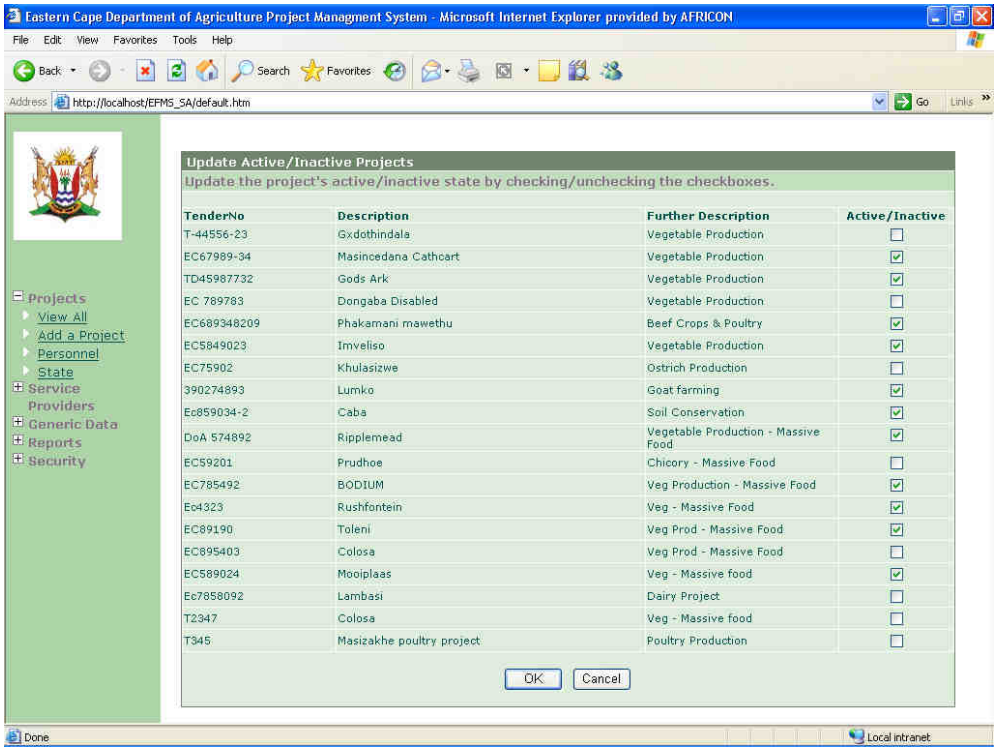
1. Expand ***Projects*** on the Menu Bar and click on the "*State*" hyperlink

   *Note: The "Active/Inactive Projects" page opens*

Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://localhost/EFMS_SA/default.htm
Go Links
Projects
View All
Add a Project
Personnel
State
Service Providers
Generic Data
Reports
Security
Active/Inactive Projects
List of all projects with active/inactive state
Edit All
ProjectNo Description Description2 Active
06 Gxdothindala Vegetable Production Edit
05 Masincedana Cathcart Vegetable Production Edit
04 Gods Ark Vegetable Production Edit
03 Dongaba Disabled Vegetable Production Edit
08 Phakamani mawethu Beef Crops & Poultry Edit
02 Imveliso Vegetable Production Edit
09 Khulasizwe Ostrich Production Edit
10 Lumko Goat farming Edit
01 Caba Soil Conservation Edit
11 Ripplemead Vegetable Production - Massive Food Edit
12 Prudhoe Chicory - Massive Food Edit
13 BODIUM Veg Production - Massive Food Edit
14 Rushfontein Veg - Massive Food Edit
15 Toleni Veg Prod - Massive Food Edit
18 Colosa Veg Prod - Massive Food Edit
17 Mooiplaas Veg - Massive food Edit
19 Lambasi Dairy Project Edit
123 Colosa Veg - Massive food Edit
1467 Masizakhe poultry project Poultry Production Edit
Done
Local intranet

2. Click on the "*Change*" hyperlink

   *Note: The "Update Active/Inactive Projects" page opens*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://localhost/EFMS_SA/default.htm
Go Links
Projects
View All
Add a Project
Personnel
State
Service Providers
Generic Data
Reports
Security
Update Active/Inactive Projects
Update the project's active/inactive state by checking/unchecking the checkboxes.
TenderNo Description Further Description Active/Inactive
T-44556-23 Gxdothindala Vegetable Production
EC67989-34 Masincedana Cathcart Vegetable Production
TD45987732 Gods Ark Vegetable Production
EC 789783 Dongaba Disabled Vegetable Production
EC689348209 Phakamani mawethu Beef Crops & Poultry
EC5849023 Imveliso Vegetable Production
EC75902 Khulasizwe Ostrich Production
390274893 Lumko Goat farming
Ec859034-2 Caba Soil Conservation
DoA 574892 Ripplemead Vegetable Production - Massive Food
EC59201 Prudhoe Chicory - Massive Food
EC785492 BODIUM Veg Production - Massive Food
Ec4323 Rushfontein Veg - Massive Food
EC89190 Toleni Veg Prod - Massive Food
EC895403 Colosa Veg Prod - Massive Food
EC589024 Mooiplaas Veg - Massive food
Ec7858092 Lambasi Dairy Project
T2347 Colosa Veg - Massive food
T345 Masizakhe poultry project Poultry Production
OK Cancel
Done
Local intranet

3. Click in the "**Active/Inactive**" check box to indicate state
4. Click on the OK button

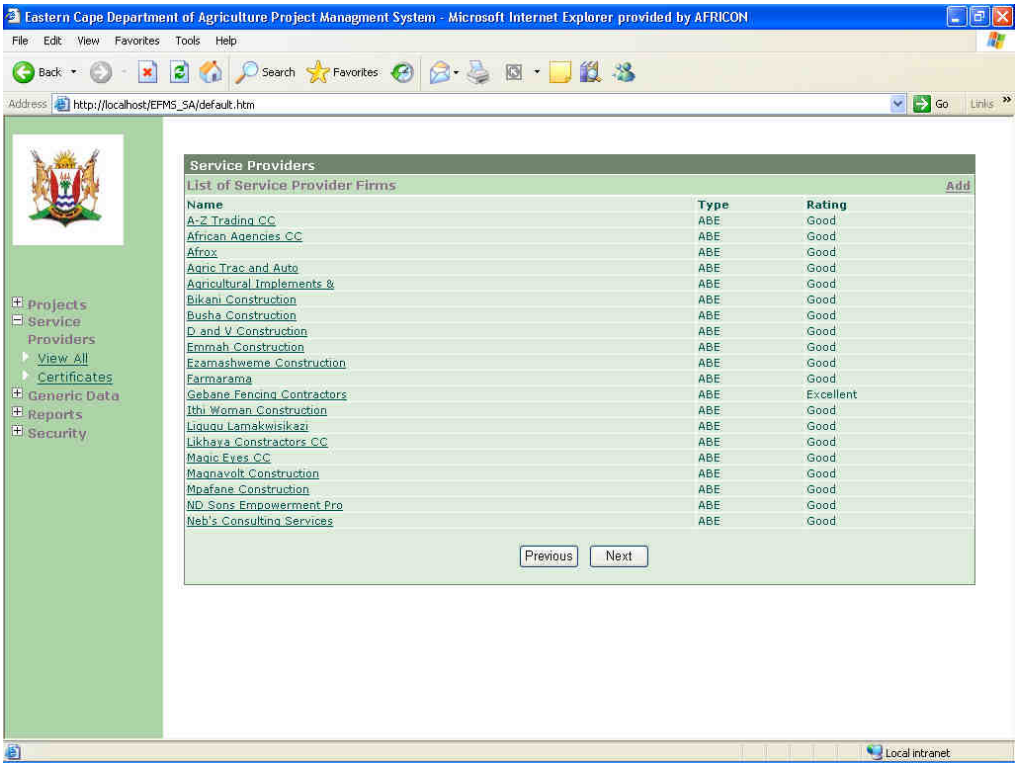
*Note: State is displayed on the "Active/Inactive Projects" page*

# SERVICE PROVIDERS

## 3.19 Viewing a list of Service Providers

1. Expand the ***Service Providers*** menu and click on the "*View All*" hyperlink

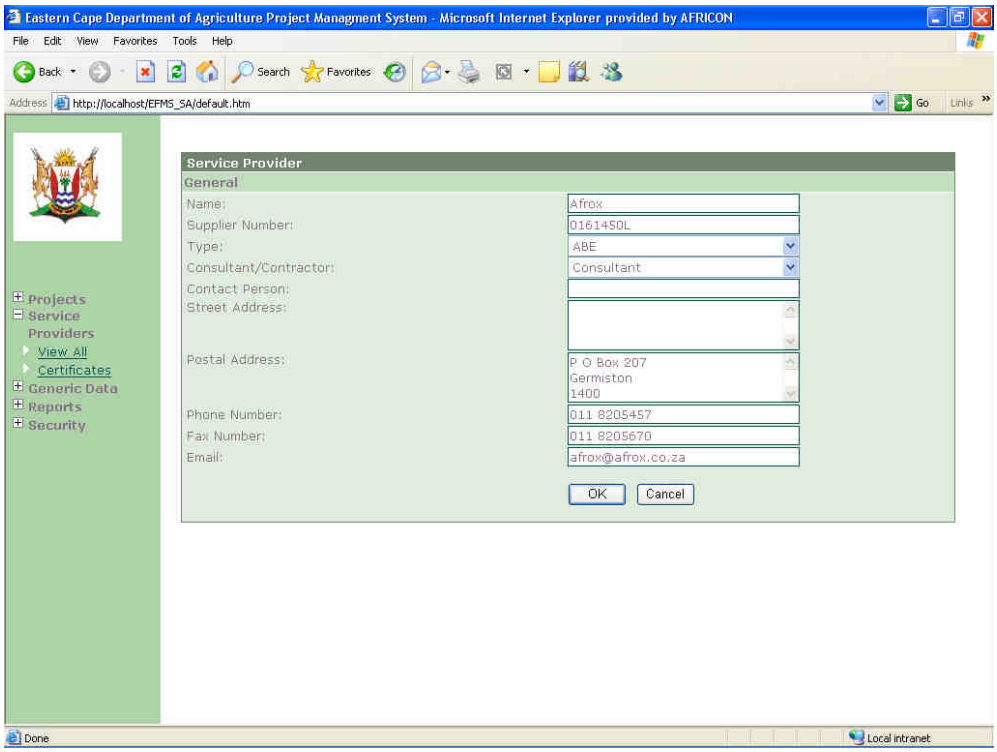
*Note: The "Service Providers" page opens, listing Service companies alphabetically*




## 3.20 Adding a Service Provider

1. Open the "*Service Providers*" page as described in 3.19 above
2. Click on the "*Add*" hyperlink

*Note: The "Service Provider" page opens*




3. Enter Service Provider details
4. Click on the OK button

   *Note: The "Service Provider - <Name>" page opens, displaying general and contact information*

### 3.20.1 Rating a Service Provider

1. Open the "*Service Providers*" page as described in 3.19 above
2. Click on the required Service Provider name hyperlink

   *Note: The "Service Provider - <Name>" page opens, displaying general and contact information*
3. Click on the "*Change*" hyperlink, next to "Rating"

   *Note: The "Update Service Provider Rating" page opens*
4. Select a Rating from the drop-down list
5. Click on the OK button

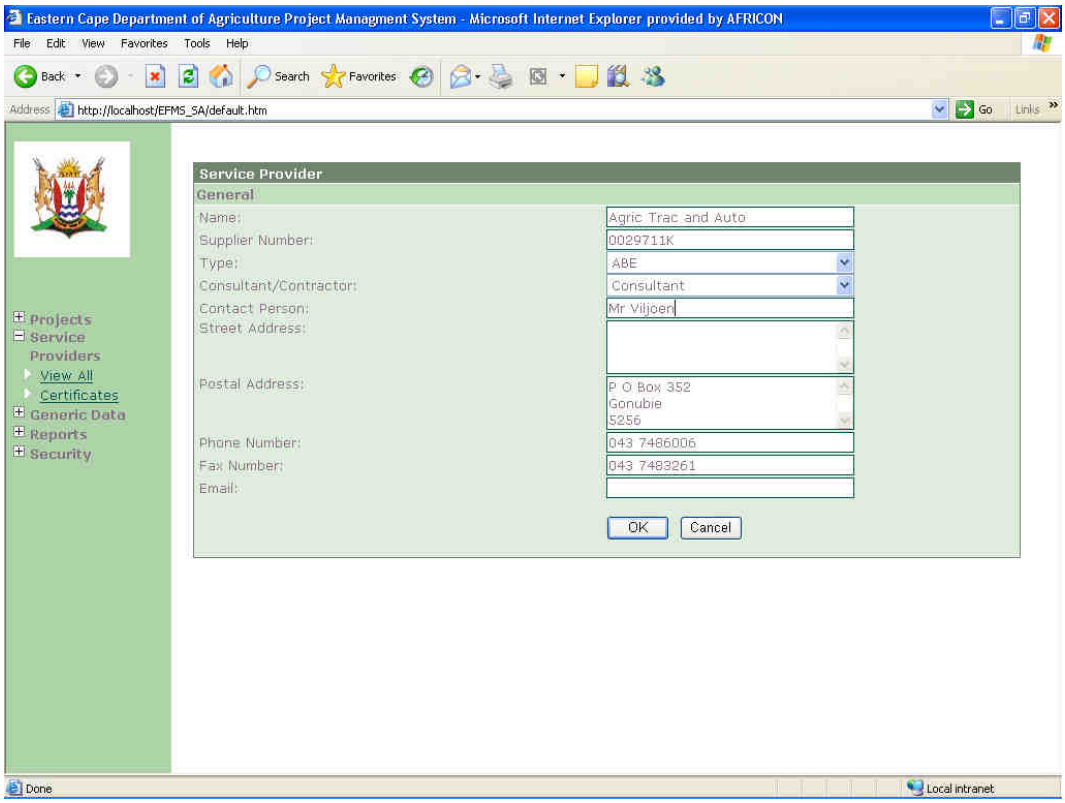
   *Note: The rating is displayed on the "Service Provider - <Name>" page*

### 3.20.2 Editing Service Provider information

1. Open the "*Service Providers*" page as described in 3.19 above
2. Click on the required Service Provider name hyperlink

   *Note: The "Service Provider - <Name>" page opens, displaying general and contact information*
3. Click on the "*Edit*" hyperlink

   *Note: The "Service Provider" page opens*




4. Change information
5. Click on the OK button

   *Note: The revised details are displayed on the "Service Provider - <Name>" page*

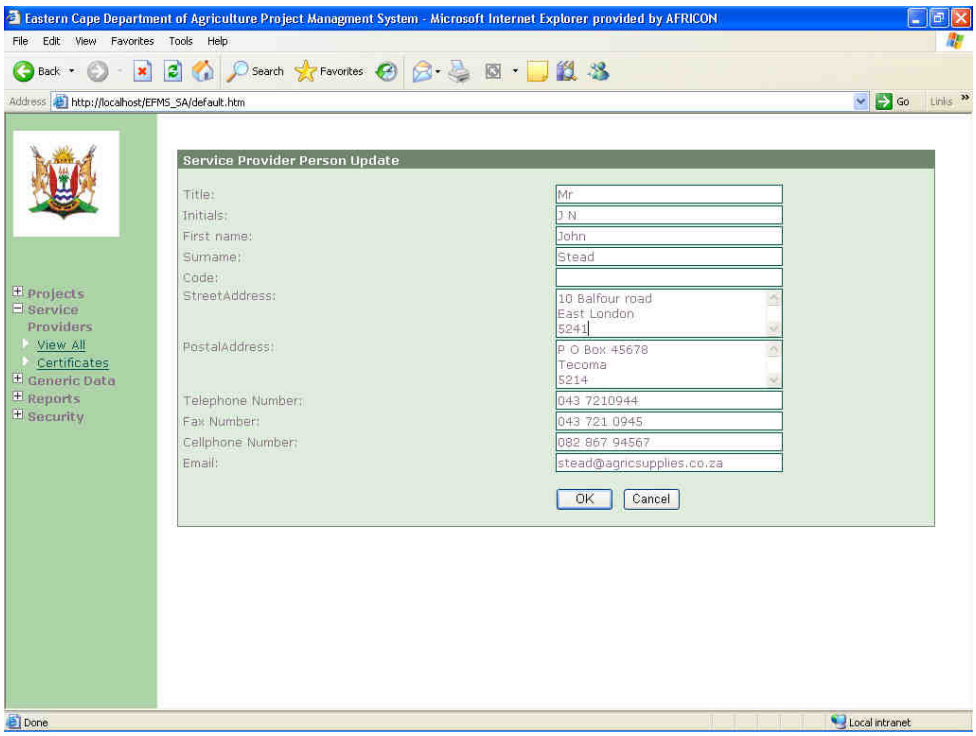
#### 3.20.2.1 Adding a Contact Person for a Service Provider

1. Open the "*Service Providers*" page as described in 3.19 above
2. Click on the required Service Provider name hyperlink

*Note: The "Service Provider - <Name>" page opens, displaying general and contact information*

3. Click on the "*Add*" hyperlink, next to "Service Provider Persons"

   *Note: The "Service Provider Person Update" page opens*




4. Enter all the applicable contact details
5. Click on the OK button

   *Note: The "Service Provider Person" page opens, displaying details*

### 3.20.2.2 Editing Service Provider Contact Person details

1. Open the "*Service Providers*" page as described in 3.19 above
2. Click on the required Service Provider name hyperlink

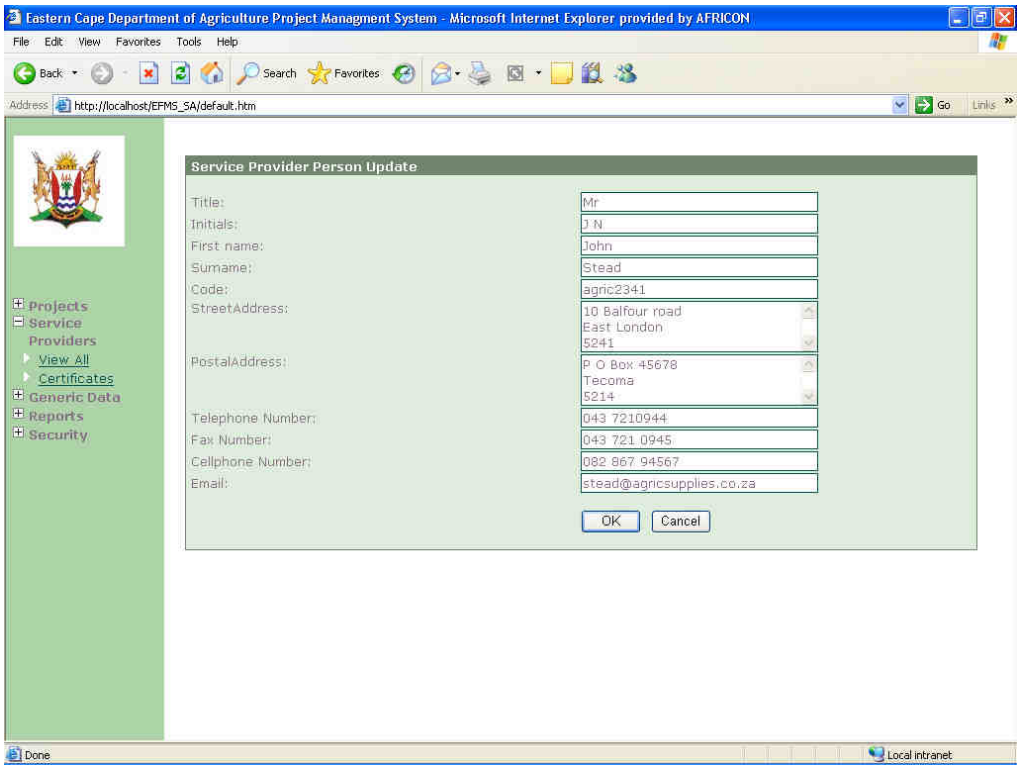
   *Note: The "Service Provider - <Name>" page opens, displaying general and contact information*

3. In the "Service Provider Persons" group, click on desired contact person name hyperlink

   *Note: The "Service Provider Person" page opens*

4. Click on the "*Edit*" hyperlink

*Note: The "Service Provider Person Update " page opens*



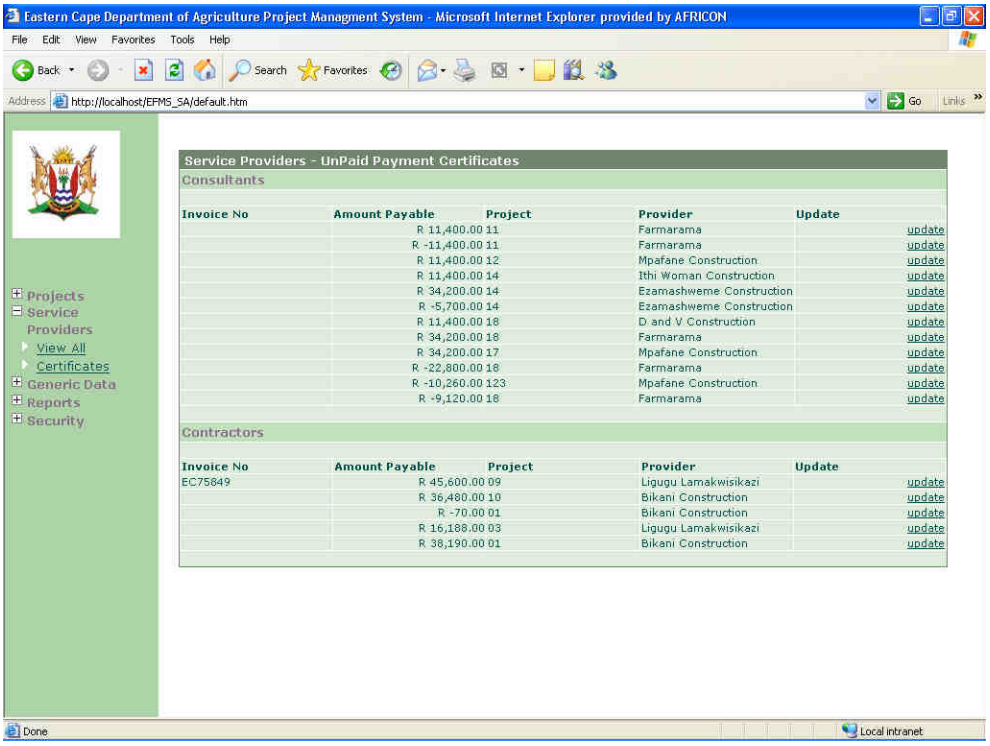

5. Change contact details
6. Click on the OK button

   *Note: The revised details are displayed on the "Service Provider Person" page*

## 3.21 Viewing Unpaid Certificates for Consultants and Contractors

1. Click on the "*Programme Management"* hyperlink on the Module Menu
2. Expand the ***Service Providers*** menu and click on the "*Certificates*" hyperlink

   *Note: The "Service Providers – Unpaid Payment Certificates" page opens, listing all unpaid invoices for Consultants and Contractors*

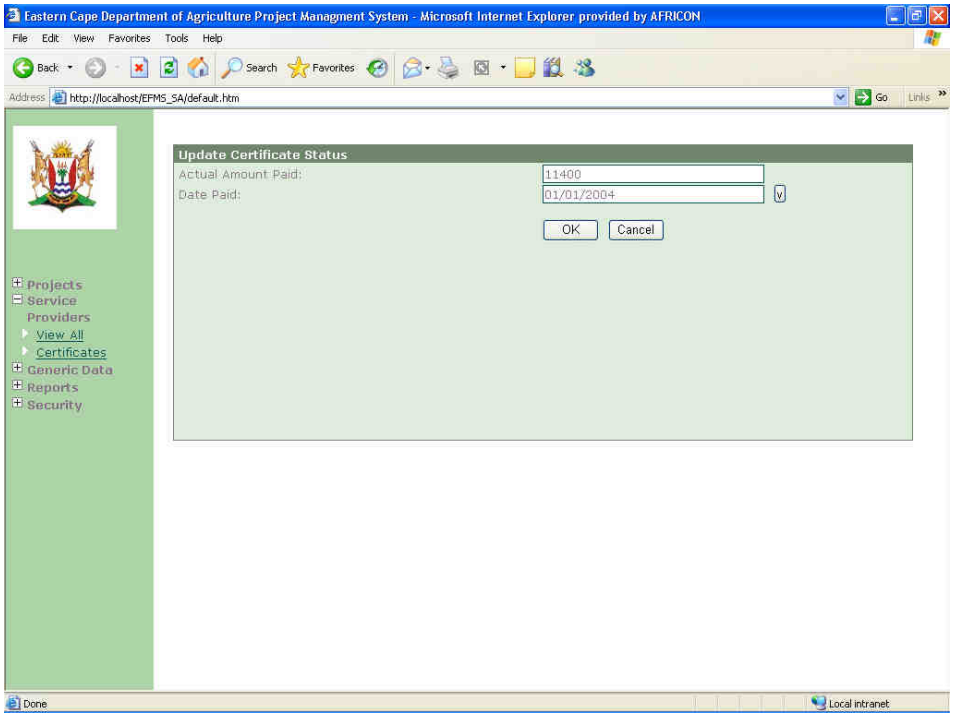

Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://localhost/EPMS_SA/default.htm
Go Links
Projects
Service Providers
View All
Certificates
Generic Data
Reports
Security
Service Providers - UnPaid Payment Certificates
Consultants
Invoice No Amount Payable Project Provider Update
R 11,400.00 11 Farmarama update
R -11,400.00 11 Farmarama update
R 11,400.00 12 Mpafane Construction update
R 11,400.00 14 Ithi Woman Construction update
R 34,200.00 14 Ezamashweme Construction update
R -5,700.00 14 Ezamashweme Construction update
R 11,400.00 18 D and V Construction update
R 34,200.00 18 Farmarama update
R 34,200.00 17 Mpafane Construction update
R -22,800.00 18 Farmarama update
R -10,260.00 123 Mpafane Construction update
R -9,120.00 18 Farmarama update
Contractors
Invoice No Amount Payable Project Provider Update
EC75849 R 45,600.00 09 Ligugu Lamakwisikazi update
R 36,480.00 10 Bikani Construction update
R -70.00 01 Bikani Construction update
R 16,188.00 03 Ligugu Lamakwisikazi update
R 38,190.00 01 Bikani Construction update
Done
Local intranet

### 3.21.1 Updating Payment Certificates for Consultants and Contractors

1. Click on the "*Programme Management"* hyperlink on the Module Menu
2. Expand the ***Service Providers*** menu and click on the "*Certificates*" hyperlink

   *Note: The "Service Providers – Unpaid Payment Certificates" page opens, listing amount payable to Consultants and Contractors*
3. Click on the "*Update*" hyperlink next to desired Invoice number

   *Note: "Update Certificate Status" page opens*




4. Enter amount payable and payment date
5. Click on the OK button

***The invoice is removed from this list. Payment details can now be viewed under "Claims" on the Project home page.***

# GENERIC DATA

## 3.22 Funding Sources

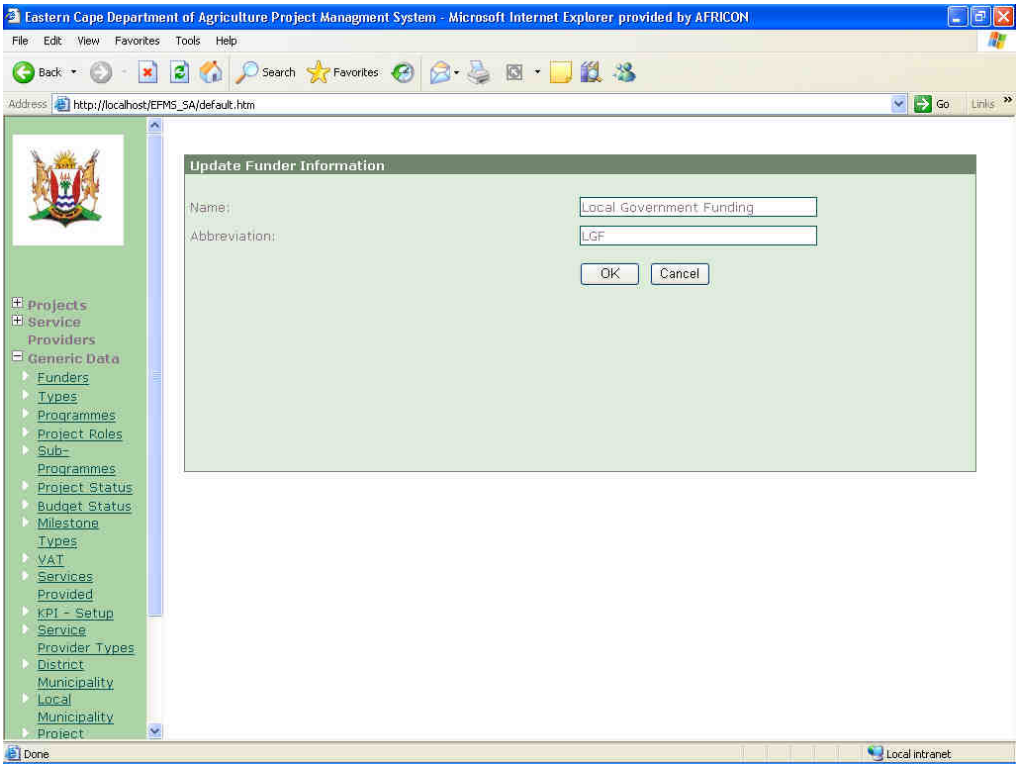
### 3.22.1 Adding A Funding Source

1. Expand the ***Generic Data*** menu and click on the "*Funders*" hyperlink

   *Note: The "Funding Sources" page opens*

2. Click on the "*Add*" hyperlink

   *Note: The "Update Funder Information" page opens*




3. Enter Name and Abbreviation for funder
4. Click on the OK button

### 3.22.2 Editing Funding Source information

1. Expand the ***Generic Data*** menu and click on the "*Funders*" hyperlink

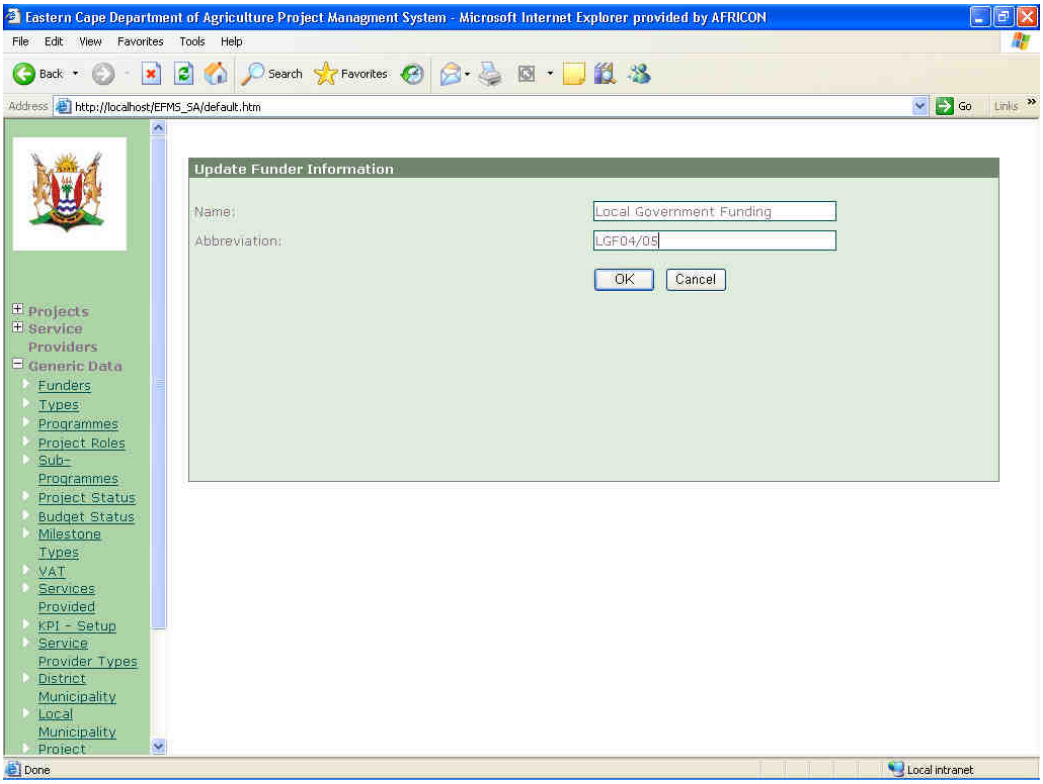
   *Note: The "Funding Sources" page opens, displaying a list of funding sources*

2. Click on the hyperlink of the required Funding Source name

   *Note: The "Funder Information" page opens*

3. Click on the "*Edit*" hyperlink

   *Note: The "Update Funder Information" page opens*




4. Change information as required
5. Click on the OK button

### 3.22.3 Viewing the budget for a Funding Source

1. Expand the ***Generic Data*** menu and click on the "*Funders*" hyperlink

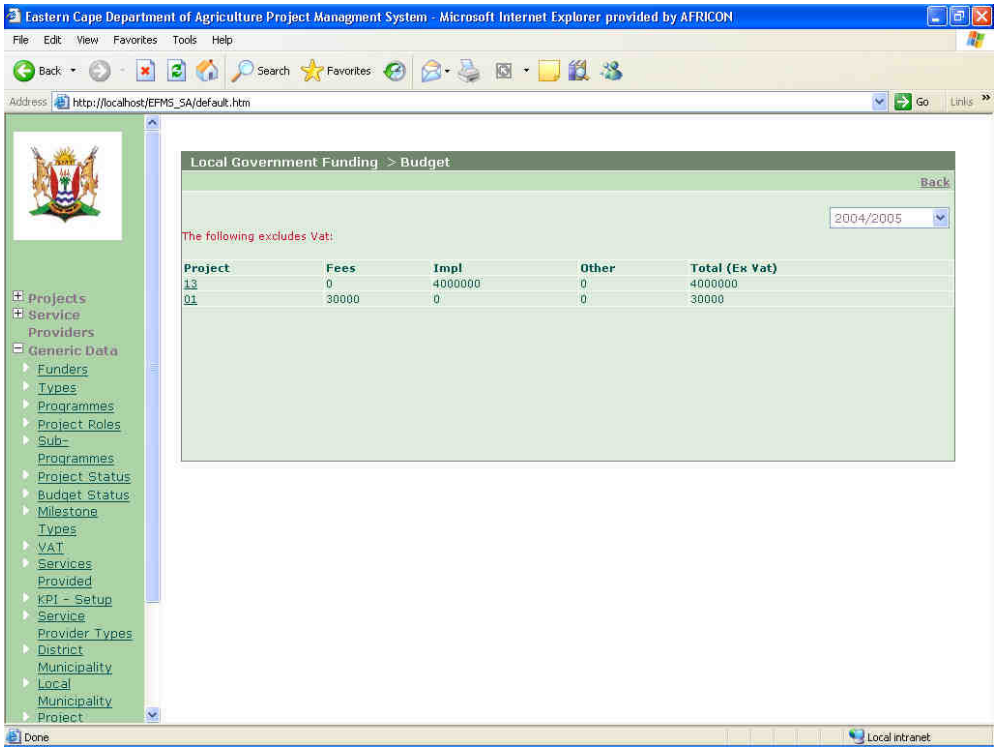
   *Note: The "Funding Sources" page opens, displaying a list of funding sources*

2. Click on the hyperlink of the required Funding Source name

   *Note: The "Funder Information" page opens*

3. Click on the "*View Budget*" hyperlink

   *Note: The "Budget" page opens*




4. Select the required Financial Year from the drop-down list

   *Note: The desired budget information is displayed*

### 3.22.4 Viewing the Project Budget interrelated with a Funding Source

1. Expand the ***Generic Data*** menu and click on the "*Funders*" hyperlink

   *Note: The "Funding Sources" page opens, displaying a list of funding sources*

2. Click on the hyperlink of the required Funding Source name

   *Note: The "Funder Information" page opens*

3. Click on the "*View Budget*" hyperlink

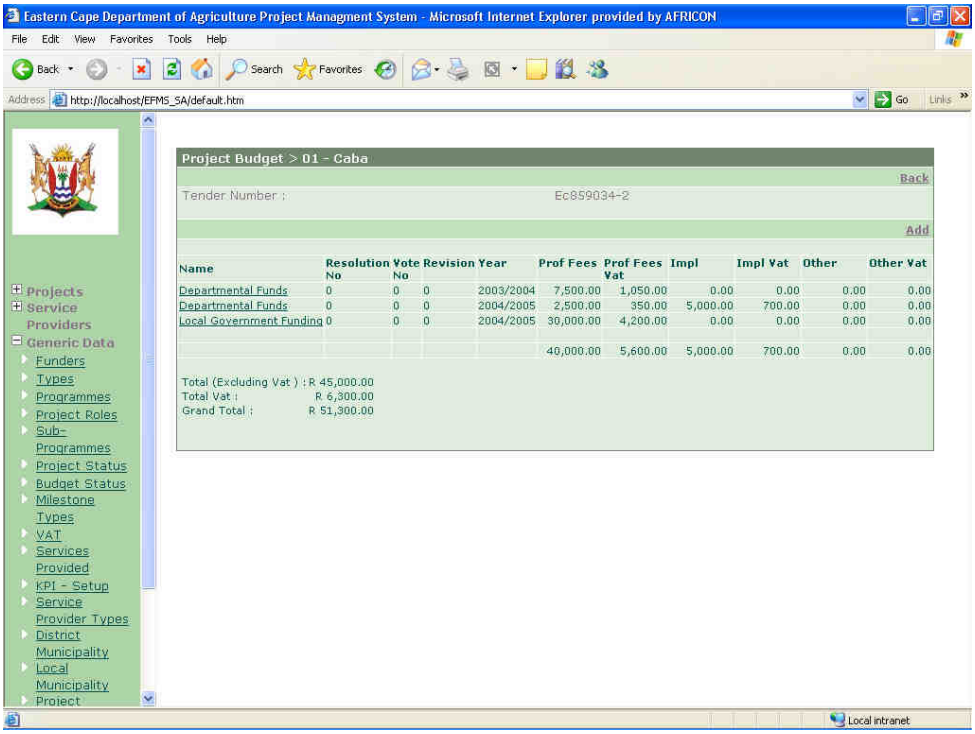
   *Note: The "Budget" page opens*

4. Select the required Financial Year from the drop-down list

   *Note: The desired budget information is displayed*

5. Click on the "Project Number" hyperlink

   *Note: The "Project Budget -<Project Number>" page is displayed*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://localhost/EPMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Funders
Types
Programmes
Project Roles
Sub-Programmes
Project Status
Budget Status
Milestone Types
VAT
Services Provided
KPI - Setup
Service Provider Types
District Municipality
Local Municipality
Project
Project Budget > 01 - Caba
Back
Tender Number : Ec859034-2
Add
Name | Resolution No | Vote No | Revision | Year | Prof Fees | Prof Fees Vat | Impl | Impl Vat | Other | Other Vat
Departmental Funds | 0 | 0 | 0 | 2003/2004 | 7,500.00 | 1,050.00 | 0.00 | 0.00 | 0.00 | 0.00
Departmental Funds | 0 | 0 | 0 | 2004/2005 | 2,500.00 | 350.00 | 5,000.00 | 700.00 | 0.00 | 0.00
Local Government Funding | 0 | 0 | 0 | 2004/2005 | 30,000.00 | 4,200.00 | 0.00 | 0.00 | 0.00 | 0.00
40,000.00 5,600.00 5,000.00 700.00 0.00 0.00
Total (Excluding Vat ) : R 45,000.00
Total Vat : R 6,300.00
Grand Total : R 51,300.00
Local intranet

# 3.23 Project Types

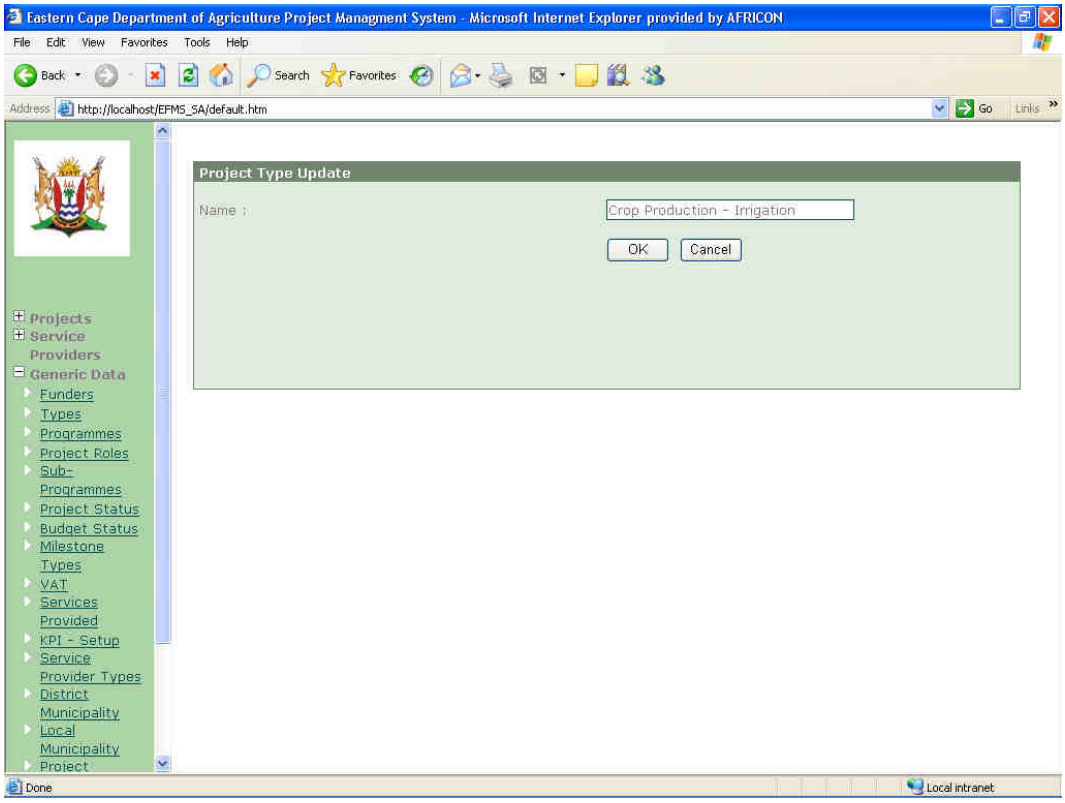
## 3.23.1 Adding a Project Type

1. Expand the ***Generic Data*** menu and click on the "*Types*" hyperlink

   *Note: The "Project Types" page opens*

2. Click on the "*Add*" hyperlink

   *Note: The ""Project Types Update" page opens*




3. Enter a name
4. Click on the OK button
5. *Note: The Project Type is listed together with the phases associated with the type*

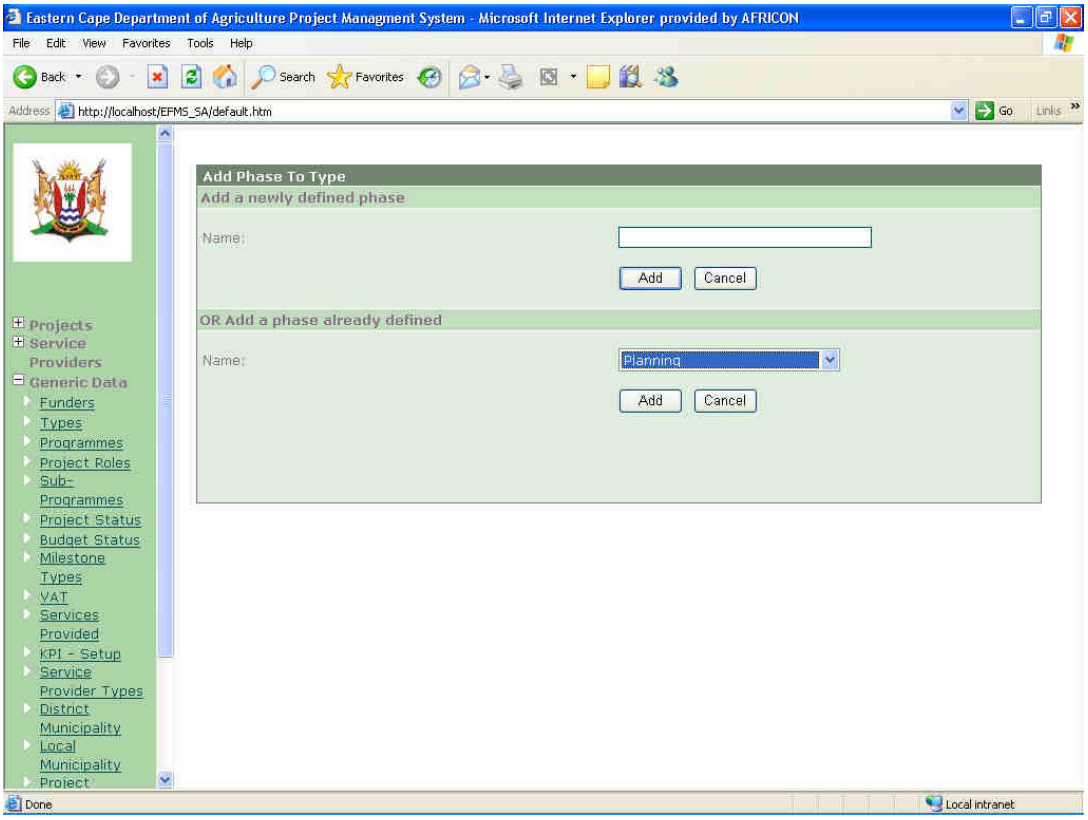
## 3.23.2 Adding a Phase associated with a Project Type

1. Expand the ***Generic Data*** menu and click on the "*Funders*" hyperlink

   *Note: The "Project Types" page opens, displaying a list of Project Types*
2. Click on the hyperlink of the required Project Type name

   *Note: The "Type" page opens, together with the phases associated with the type*
3. Click on the "*Add*" hyperlink

   *Note: The "Add Phase to Type" page opens*




4. Enter name for newly defined phase
5. Click on the ADD button

**Alternatively:**

5. Select a name from the already defined drop-down list
6. Click on the ADD button

### 3.23.2.1 Editing a Phase associated with a Project Type

1. Expand the ***Generic Data*** menu and click on the "*Funders*" hyperlink

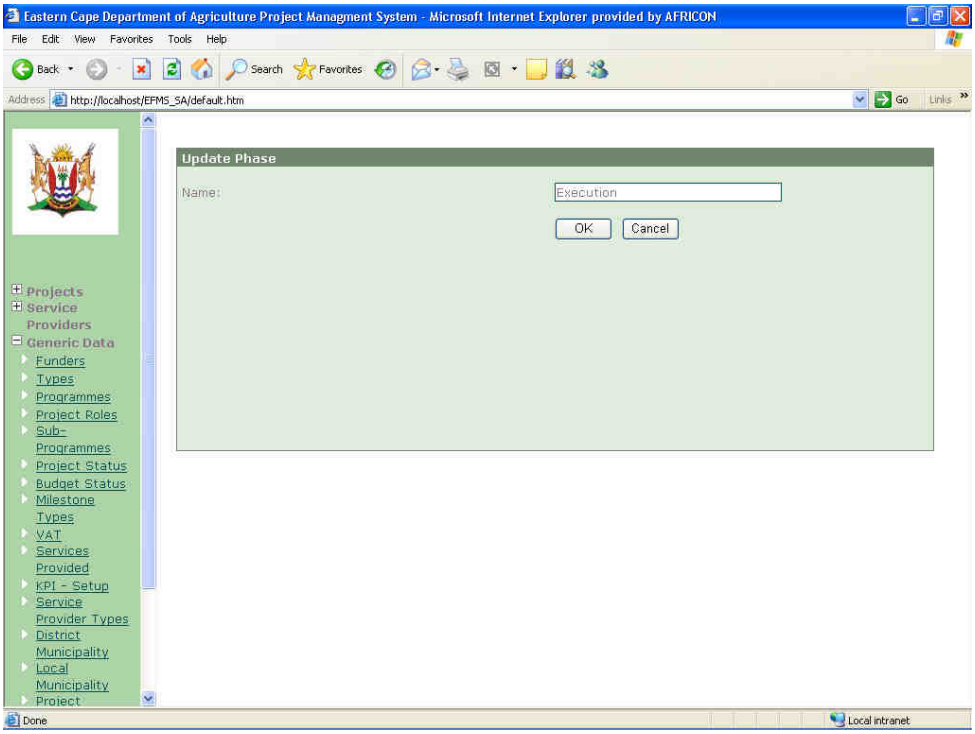
   *Note: The "Project Types" page opens, displaying a list of Project Types*

2. Click on the hyperlink of the required Project Type name

   *Note: The "Type" page opens, together with the phases associated with the type*

3. Click on the "*Edit*" hyperlink next to desired phase

   *Note: The "Update Phase" page opens*




4. Change information as required
5. Click on the OK button

### 3.23.3 Editing a Project Type

1. Expand the ***Generic Data*** menu and click on the "*Funders*" hyperlink

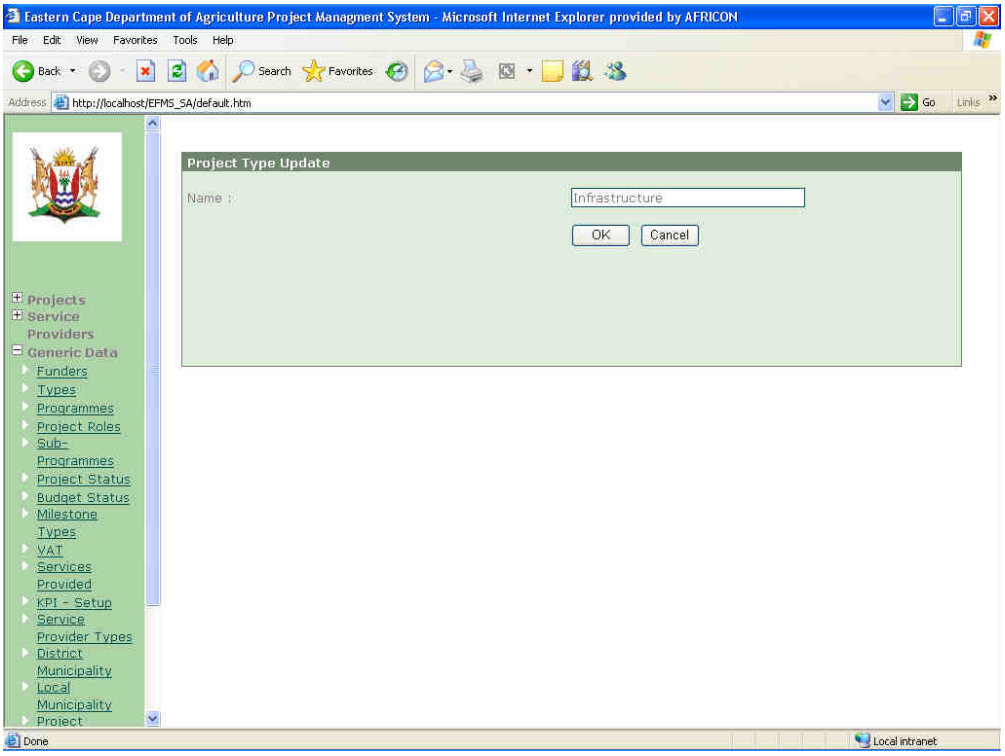
   *Note: The "Project Types" page opens, displaying a list of Project Types*

2. Click on the hyperlink of the required Project Type name

   *Note: The "Type" page opens*

3. Click on the "*Edit*" hyperlink

   *Note: The "Project Type Update" page opens*




4. Change information as required
5. Click on the OK button

# 3.24 Programmes

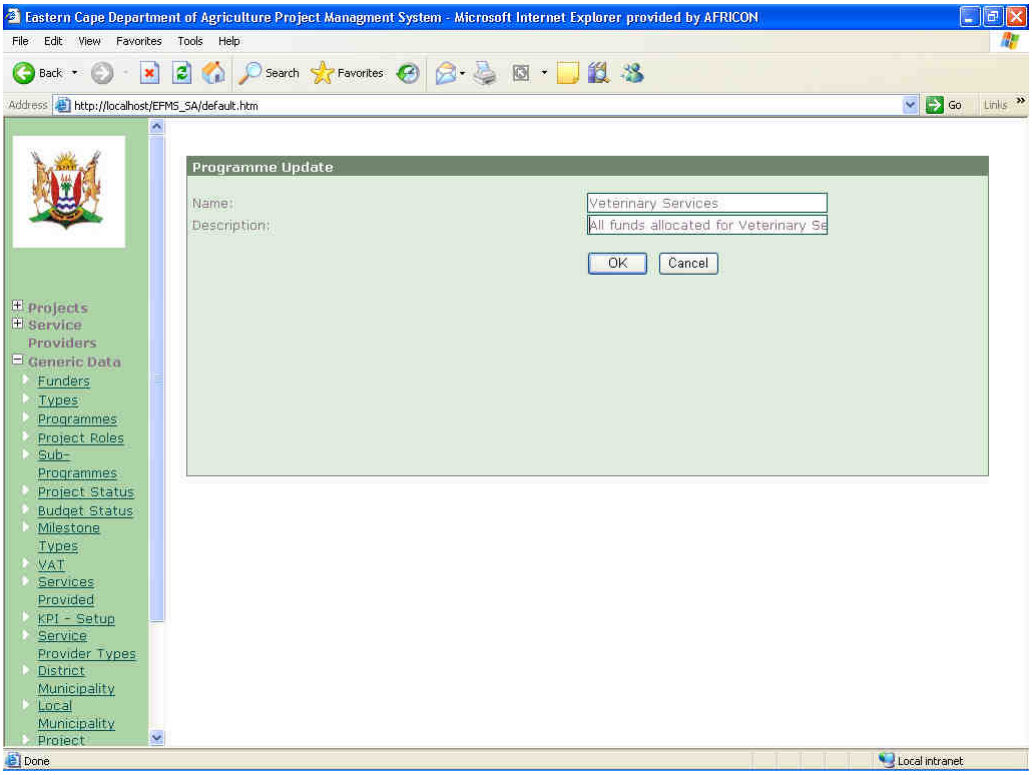
## 3.24.1 Adding a Programme

1. Expand the ***Generic Data*** menu and click on the "*Programmes*" hyperlink

   *Note: The "Programmes" page opens*

2. Click on the "*Add*" hyperlink

   *Note: The "Programme Update" page opens*




3. Enter a name and description
4. Click on the OK button

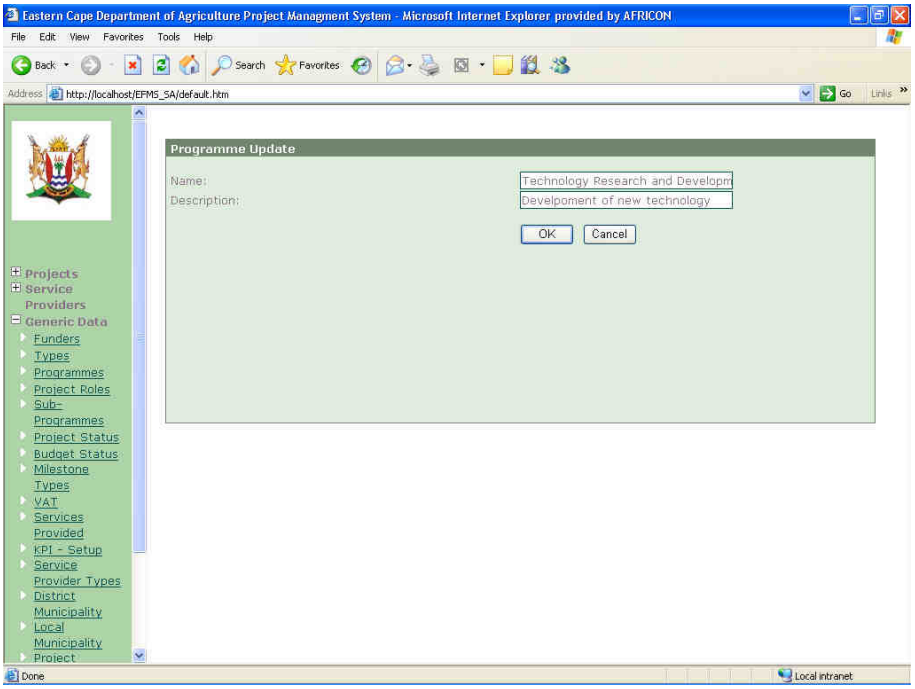
   *Note: The new Programme name appears in the Programmes list*

## 3.24.2 Editing Programme information

1. Expand the ***Generic Data*** menu and click on the "*Programmes*" hyperlink

   *Note: The "Programmes" page opens, displaying a list of Programme names*
2. Click on the "*Programme Name*" hyperlink
3. Click on the "*Edit*" hyperlink

   *Note: The "Programme Update" page opens*




4. Change name or description
5. Click on the OK button

   *Note: The revised Programme information appears in the Programmes list*

### 3.24.3 Removing a Programme

1. Expand the ***Generic Data*** menu and click on the "*Programmes*" hyperlink

   *Note: The "Programmes" page opens, displaying a list of Programme names*
2. Click on the "*Remove*" hyperlink next to desired name

   *Note: The Programme name is deleted from the list*

## 3.25 Project Roles

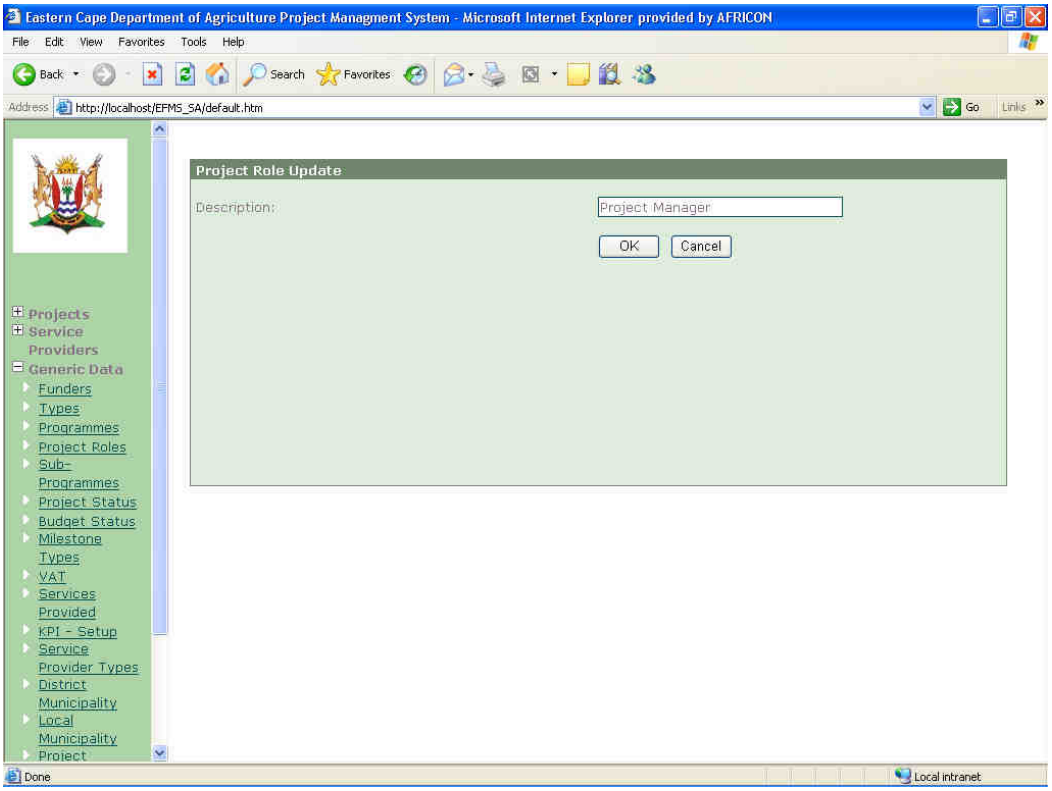
### 3.25.1 Adding a Project Role

1. Expand the ***Generic Data*** menu and click on the "*Project Roles*" hyperlink

   *Note: The "Project Roles" page opens*

2. Click on the "*Add*" hyperlink

   *Note: The "Project Role Update" page opens*




3. Enter a description
4. Click on the OK button

   *Note: The new name appears in the Project Roles list*

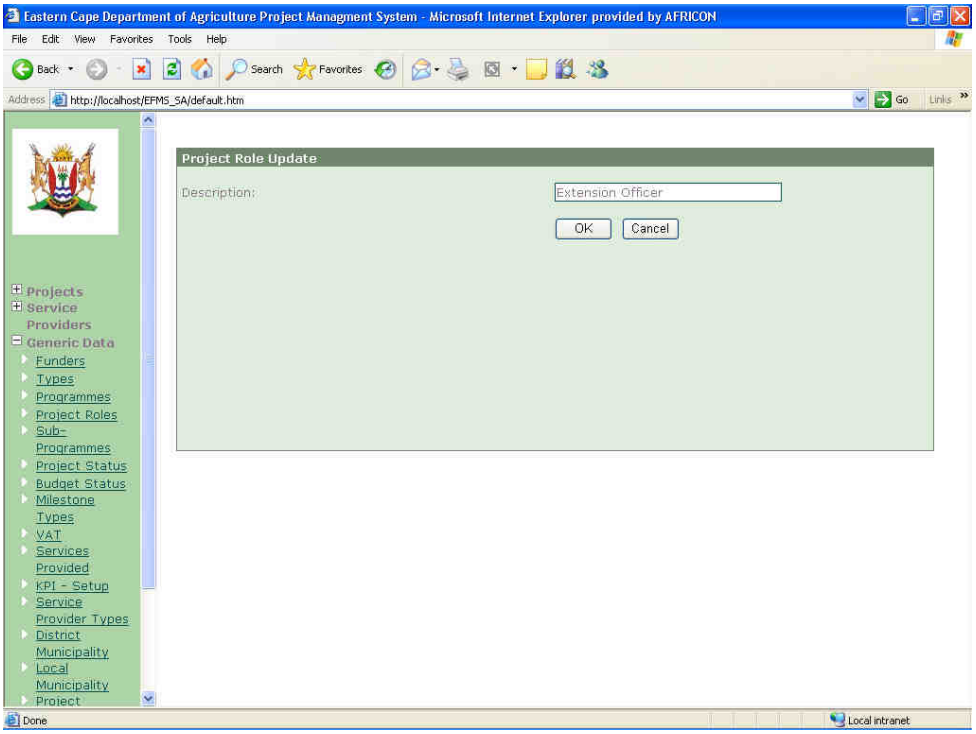
## 3.25.2 Editing a Project Role

1. Expand the ***Generic Data*** menu and click on the "*Project Roles*" hyperlink

   *Note: The "Project Roles" page opens, displaying a list of Project Role names*

2. Click on the "*Edit*" hyperlink next to desired Role name

   *Note: The "Project Role Update" page opens*




3. Change description as required
4. Click on the OK button

# 3.26 Sub Programme

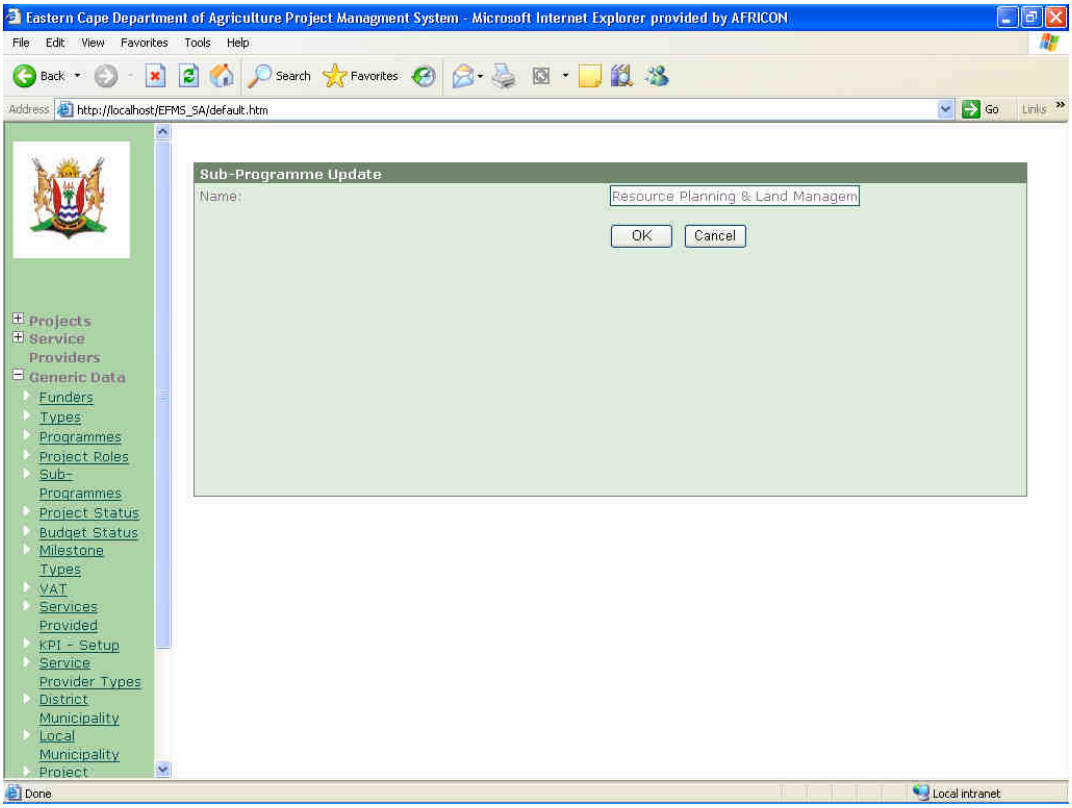
## 3.26.1 Adding a Sub Programme

1. Expand the ***Generic Data*** menu and click on the "*Sub Programme*" hyperlink

   *Note: The "Sub Programme" page opens*

2. Click on the "*Add*" hyperlink

   *Note: The "Sub Programme Update" page opens*




3. Enter a name
4. Click on the OK button

   *Note: The new name appears in the Sub Programme list*

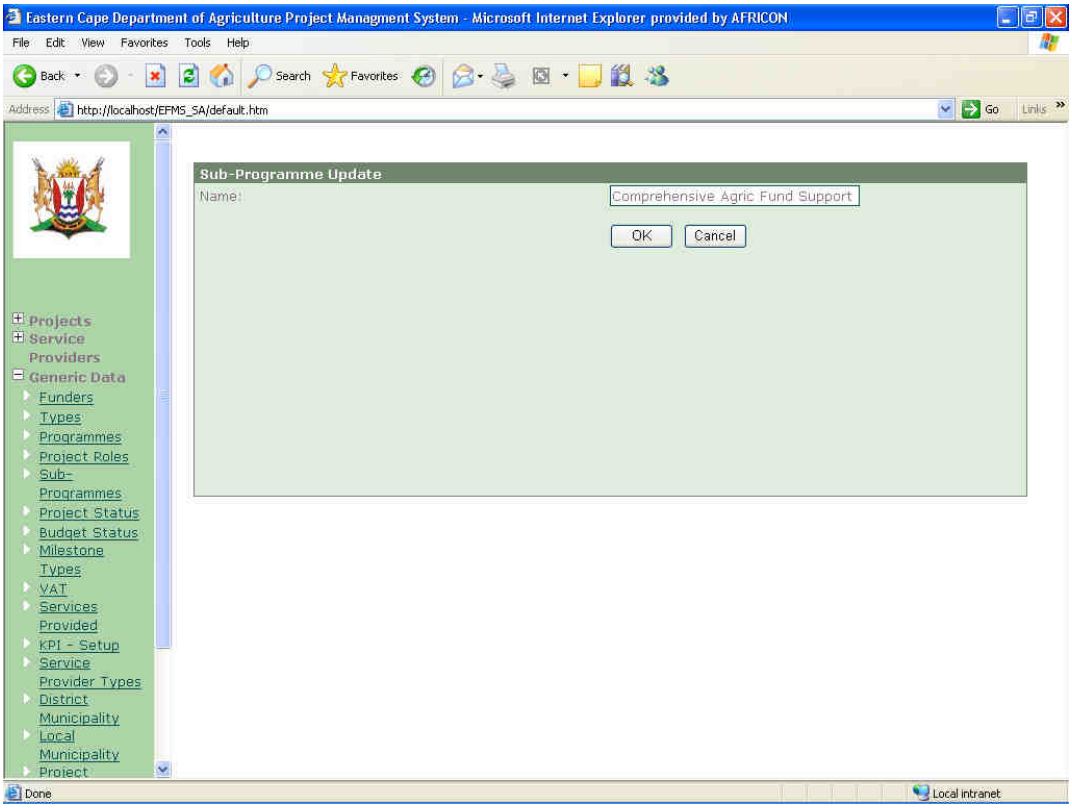
## 3.26.2 Editing a Sub Programme

1. Expand the ***Generic Data*** menu and click on the "*Sub Programme*" hyperlink

   *Note: The "Sub Programme" page opens*

2. Click on the "*Edit*" hyperlink next to desired Sub Programme

   *Note: The "Sub Programme Update" page opens*




3. Change details
4. Click on the OK button

   *Note: The new details appear in the Category list*

### 3.26.3 Removing a Sub Programme

1. Expand the ***Generic Data*** menu and click on the "Sub Programme" hyperlink

   *Note: The "Sub Programme" page opens*

2. Click on the "*Remove*" hyperlink next to desired Sub Programme

   *Note: The Sub Programme is deleted*

## 3.27 Project Statuses

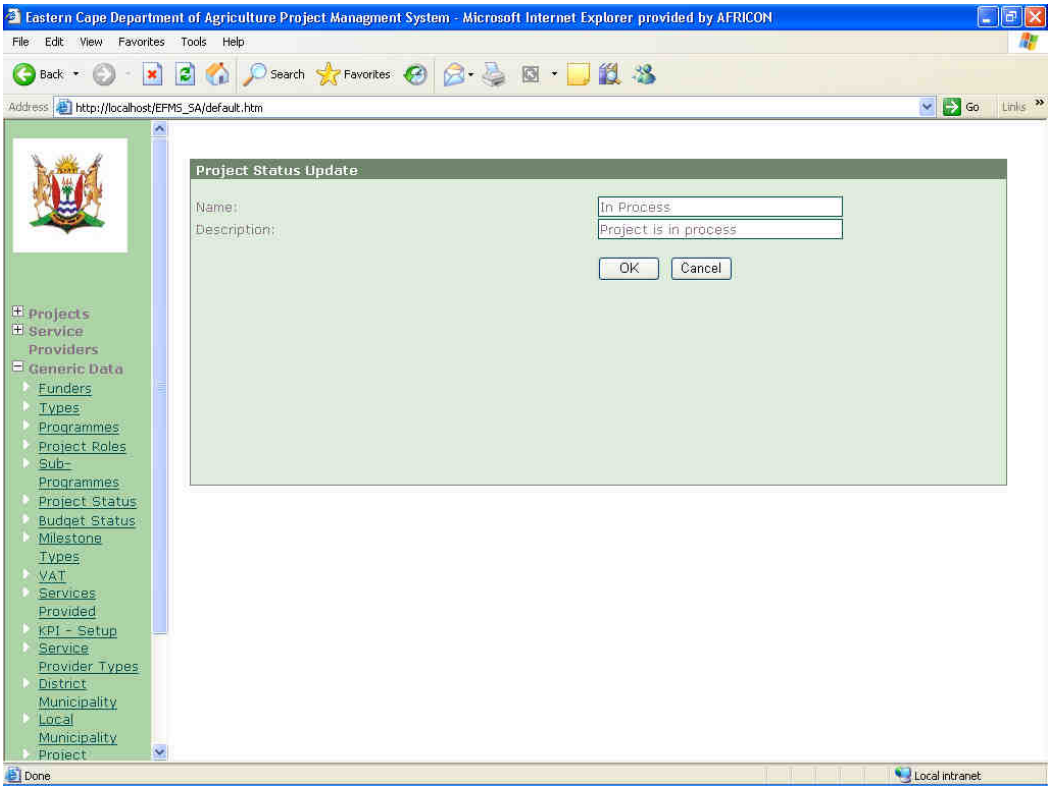
### 3.27.1 Adding a Project Status

1. Expand the ***Generic Data*** menu and click on the "*Project Status*" hyperlink

*Note: The "Project Status" page opens*

2. Click on the "*Add*" hyperlink

*Note: The "Project Status Update" page opens*




3. Enter a name and description
4. Click on the OK button

*Note: The new name appears in the Project Status list*

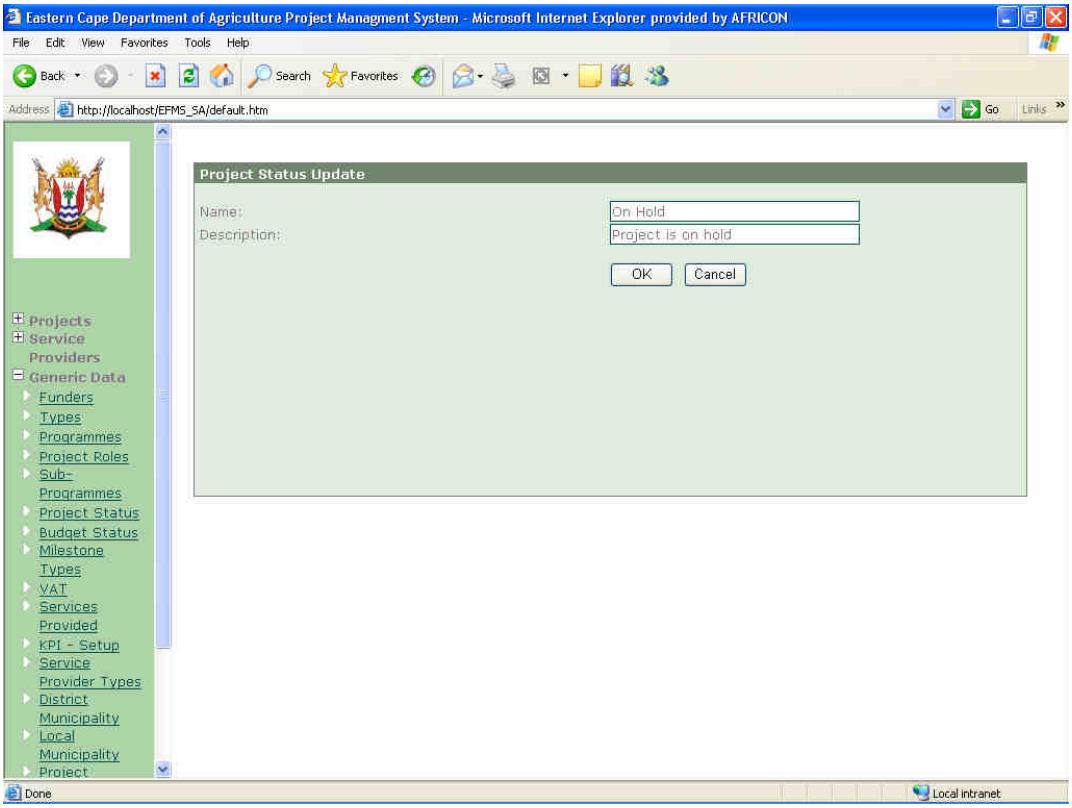
## 3.27.2 Editing a Project Status

1. Expand the ***Generic Data*** menu and click on the "*Project Status*" hyperlink

*Note: The "Project Status" page opens*

2. Click on the "*Edit*" hyperlink next to desired Status

*Note: The "Project Status Update" page opens*




3. Change details
4. Click on the OK button

   *Note: The new details appear in the Project Status list*

### 3.27.3 Removing a Project Status

1. Expand the ***Generic Data*** menu and click on the "*Project Status*" hyperlink

   *Note: The "Project Status" page opens*

2. Click on the "*Remove*" hyperlink next to desired Status

   *Note: The Project Status is deleted*

## 3.28 Budget Statuses

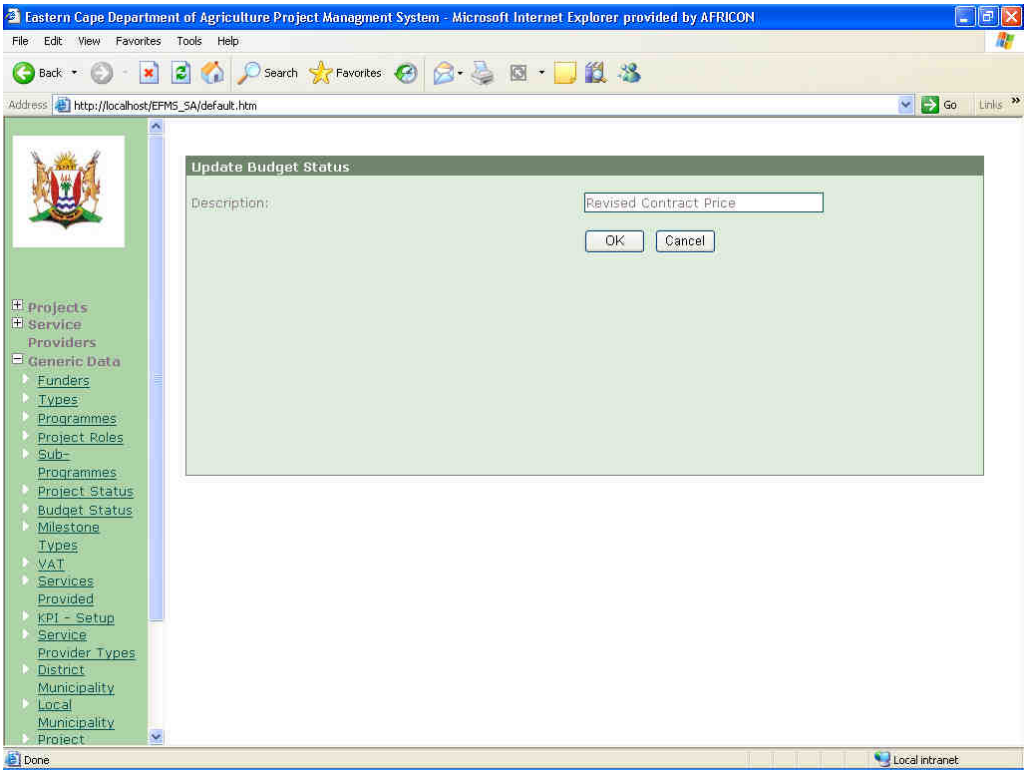
### 3.28.1 Adding a Budget Status

1. Expand the ***Generic Data*** menu and click on the "*Budget Status*" hyperlink

*Note: The "Budget Status" page opens*

2. Click on the "*Add*" hyperlink

*Note: The "Update Budget Status" page opens*




3. Enter a description
4. Click on the OK button

*Note: The new name appears in the Budget Status list*

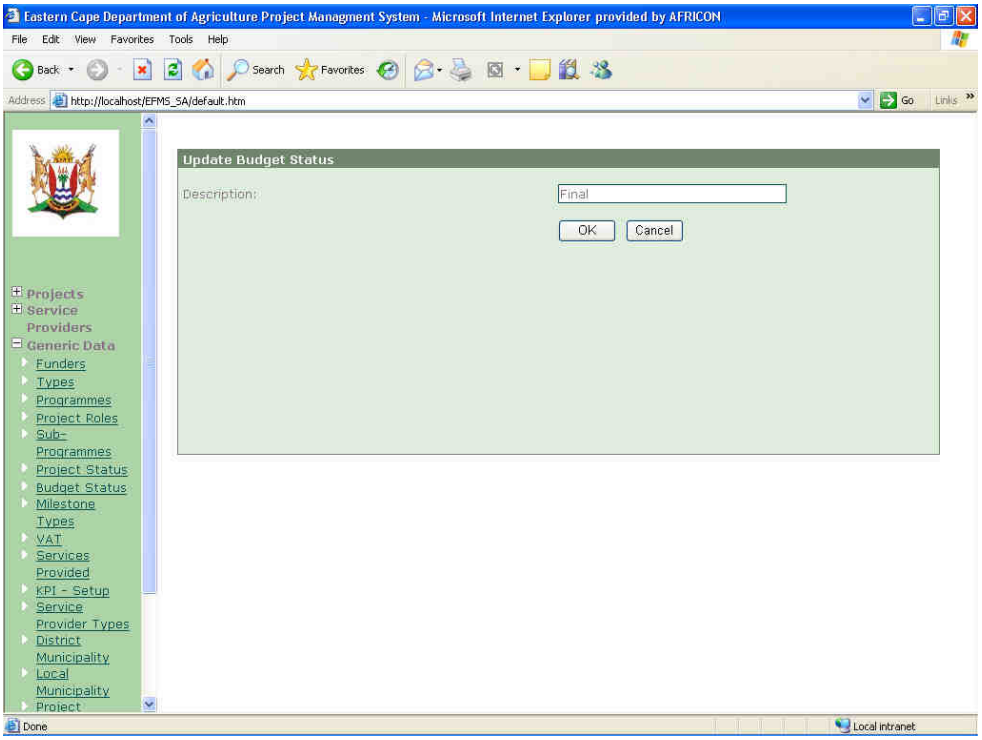
## 3.28.2 Editing Budget Status description

1. Expand the ***Generic Data*** menu and click on the "*Budget Status*" hyperlink

*Note: The "Budget Status" page opens*

2. Click on the "*Edit*" hyperlink next to desired Status

*Note: The "Update Budget Status" page opens*




3. Change description
4. Click on the OK button

   *Note: The new description appears in the Budget Status list*

# 3.29 Milestone Types

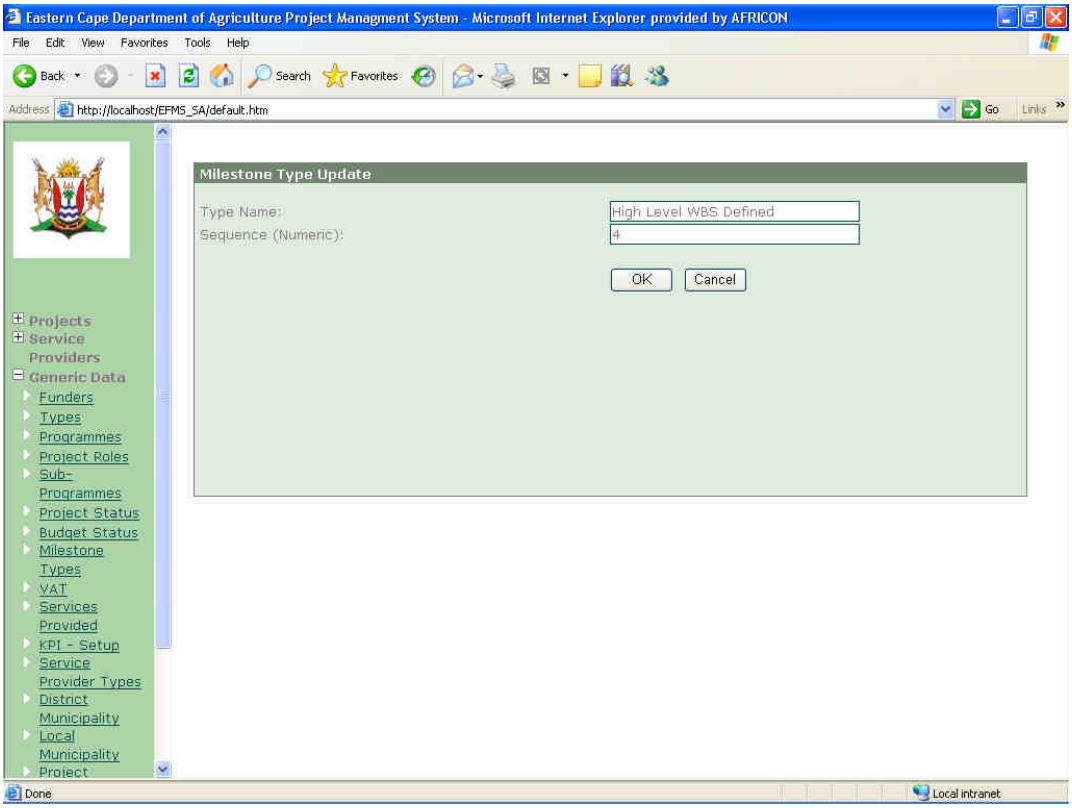
## 3.29.1 Adding a Milestone Type

1. Expand the ***Generic Data*** menu and click on the "*Milestone Types*" hyperlink

   *Note: The "Milestone Types" page opens*

2. Click on the "*Add*" hyperlink

   *Note: The "Milestone Types Update" page opens*




3. Enter a name
4. Click on the OK button

   *Note: The new name appears in the Milestone Types list*

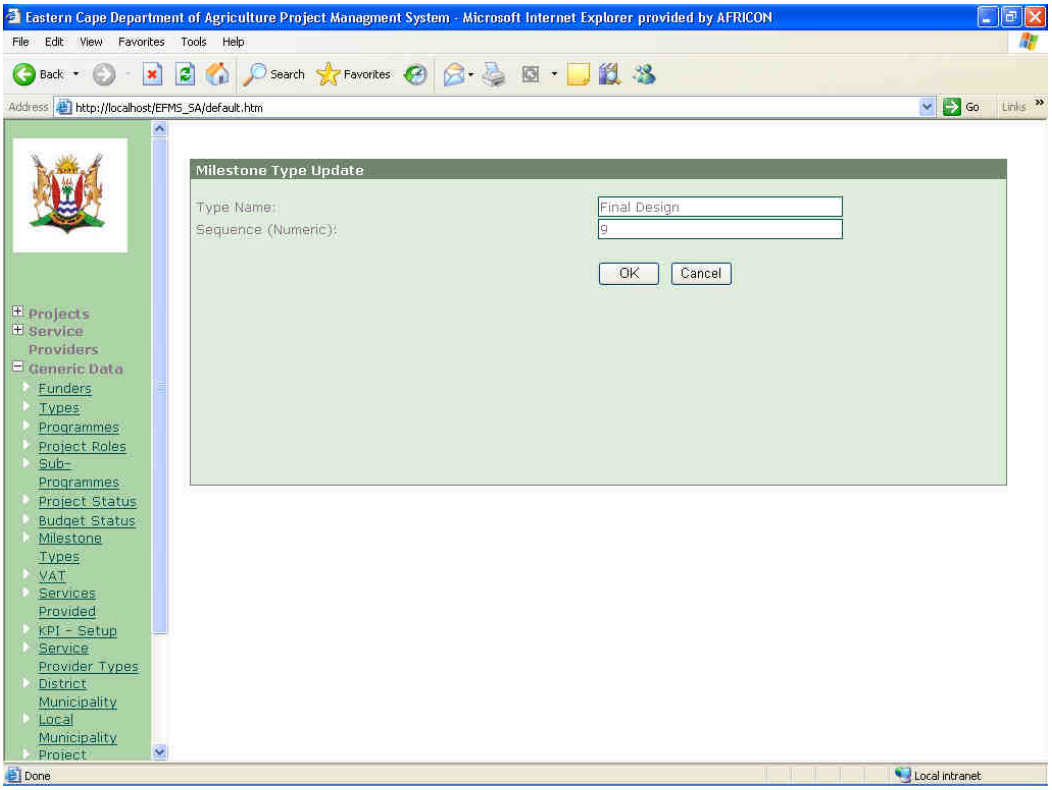
## 3.29.2 Editing a Milestone Type

1. Expand the ***Generic Data*** menu and click on the "*Milestone Types*" hyperlink

   *Note: The "Milestone Types" page opens*

2. Click on the "*Edit*" hyperlink next to desired Status

   *Note: The "Milestone Types Update" page opens*




3. Change name as desired
4. Click on the OK button

   *Note: The revised name appears in the Milestone Types list*

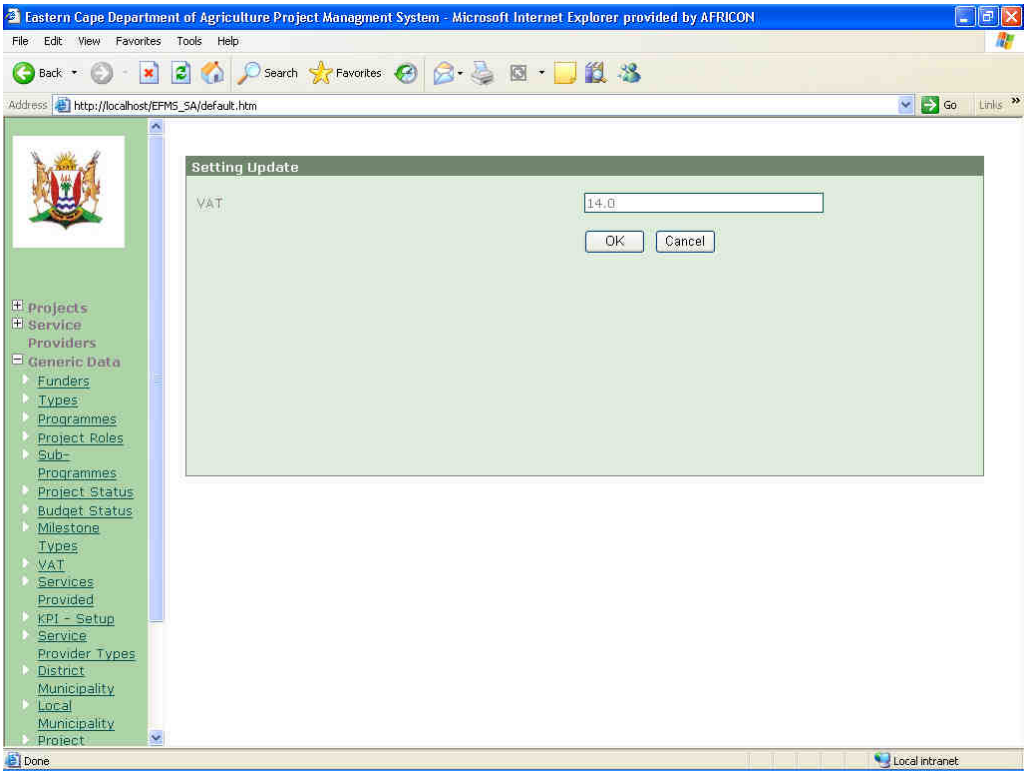
## 3.30 Changing the VAT rate

1. Expand the ***Generic Data*** menu and click on the "*VAT*" hyperlink

   *Note: The "VAT" page opens*

2. Click on the "*Edit*" hyperlink

   *Note: The "Setting Update" page opens*




3. Enter a new VAT rate
4. Click on the OK button

   *Note: This new current rate will be used in all new calculations*

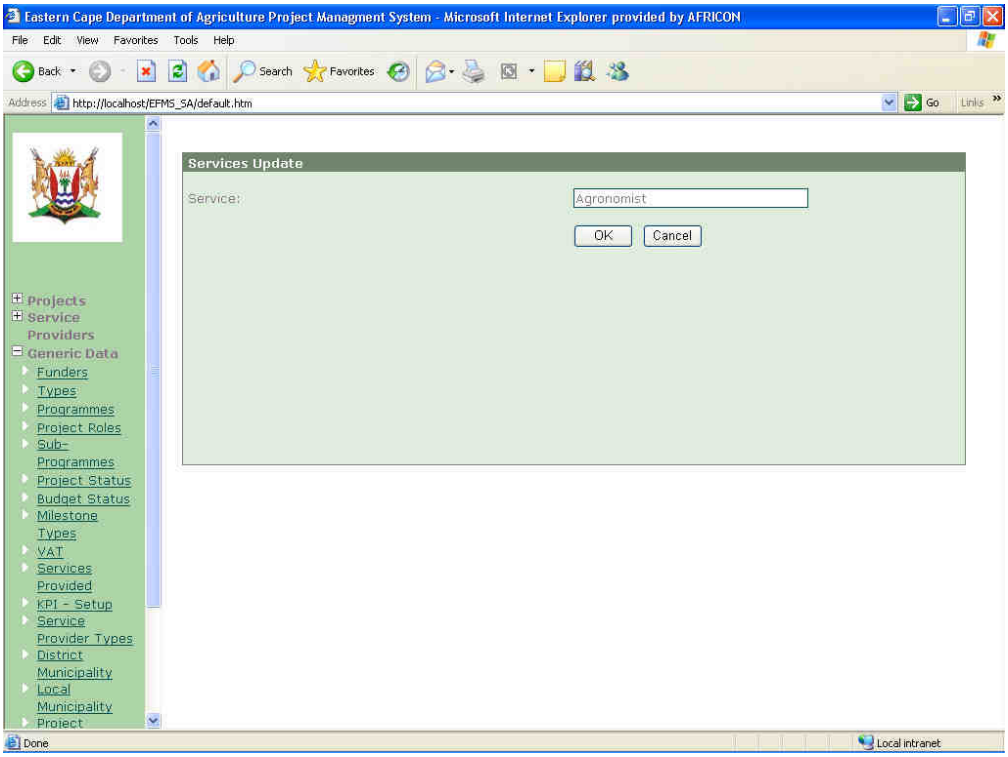
# 3.31 Services Provided

## 3.31.1 Adding a Service

1. Expand the ***Generic Data*** menu and click on the "*Services Provided*" hyperlink

   *Note: The "Services Provided" page opens*
2. Click on the "*Add*" hyperlink

   *Note: The "Services Update" page opens*




3. Enter a service name
4. Click on the OK button

   *Note: The new name appears in the Services list*

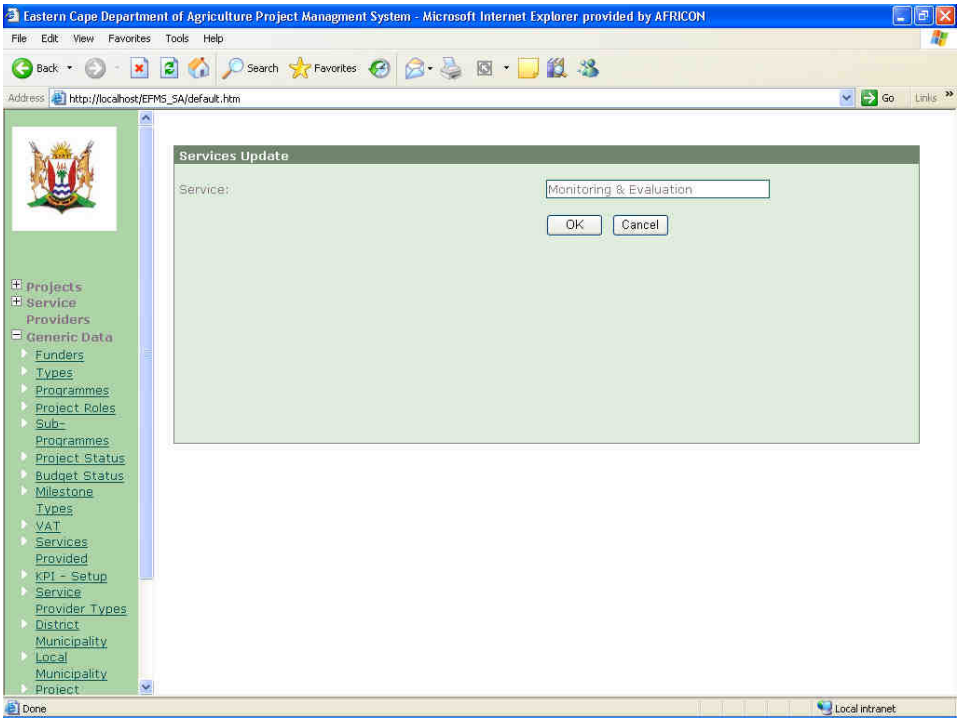
## 3.31.2 Editing Service details

1. Expand the ***Generic Data*** menu and click on the "*Services Provided*" hyperlink

   *Note: The "Services Provided" page opens*

2. Click on the "*Edit*" hyperlink next to desired Service

   *Note: The "Services Update" page opens*




3. Change service name as desired
4. Click on the OK button

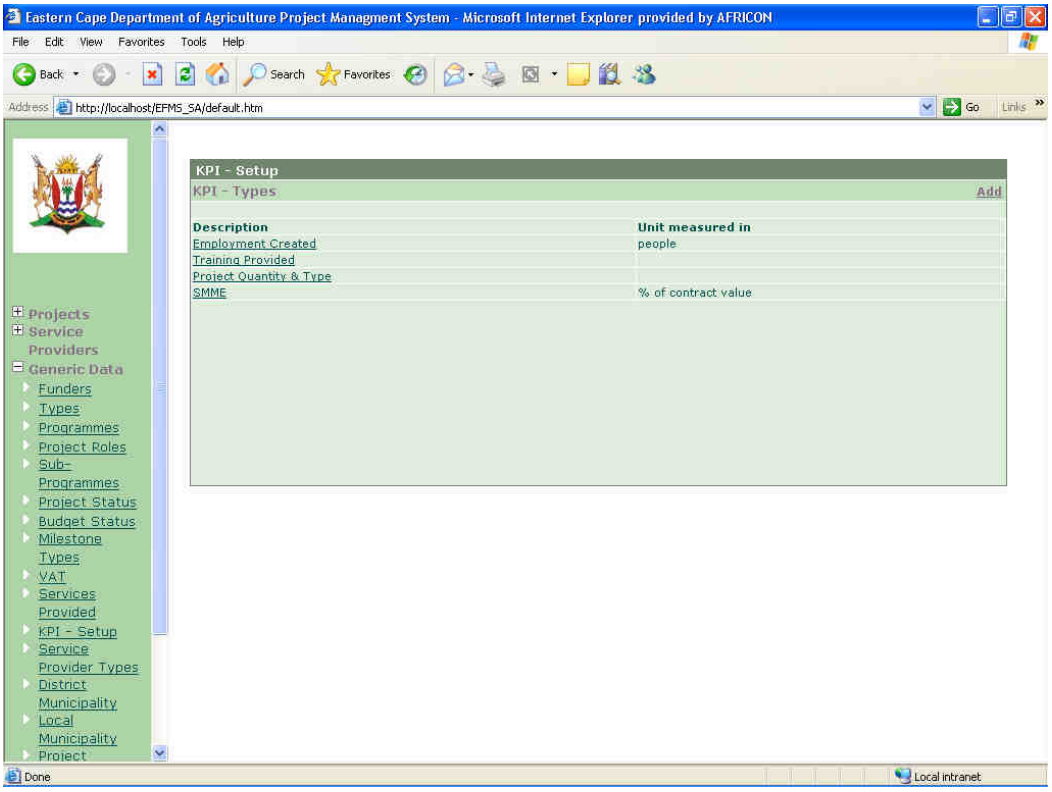
   *Note: The revised name appears in the Services list*

## 3.32 KPI – Setup

### 3.32.1 Adding a Criteria, Categories or Sub Categories

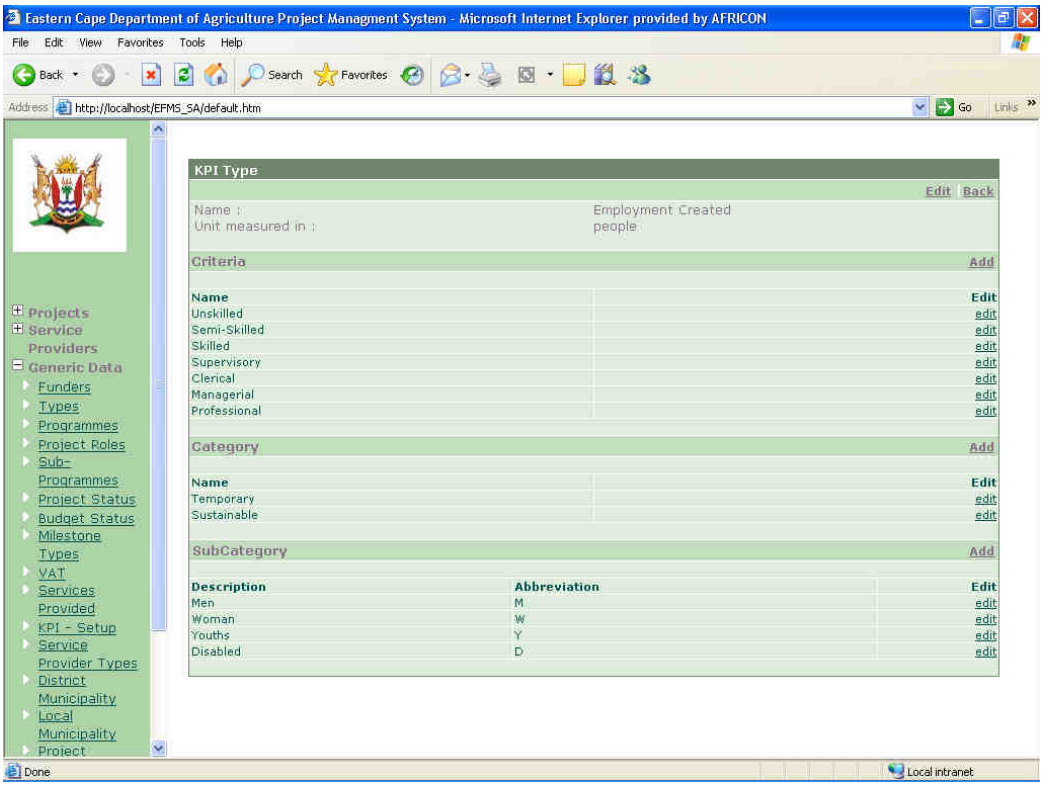
1. Expand the ***Generic Data*** menu and click on the "*KPI Setup*" hyperlink

   *Note: The "KPI Types" page opens, showing the different KPI Types*



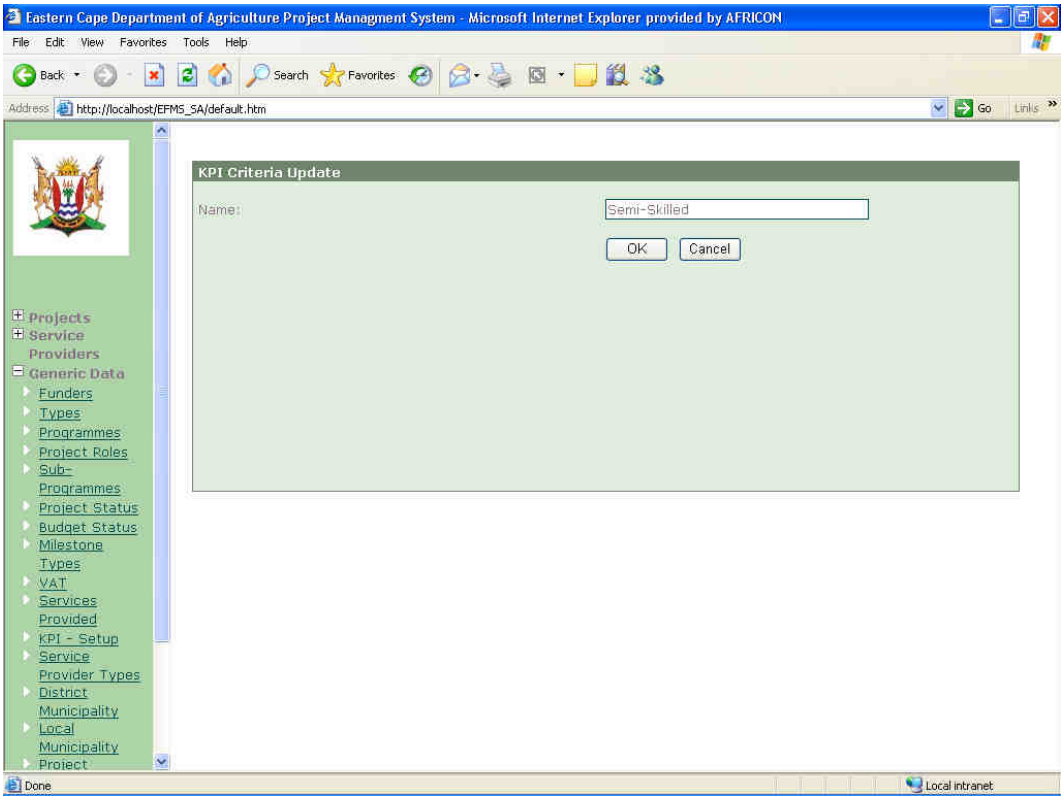

2. Click on the "*Employment Created*" hyperlink on the Module Menu

*Note: The "KPI Details" page opens, showing the different KPI details*



3. Click on the "*Add*" hyperlink next to required group

   *Note: The "<Chosen Group> Update" page opens*




4. Enter particulars
5. Click on the OK button

   *Note: The new name/description appears in the either the chosen Criteria, Categories or Sub Categories Type list*

## 3.32.2 Editing a Criteria, Categories or Sub Categories

1. Expand the ***Generic Data*** menu and click on the "*KPI –Setup*" hyperlink

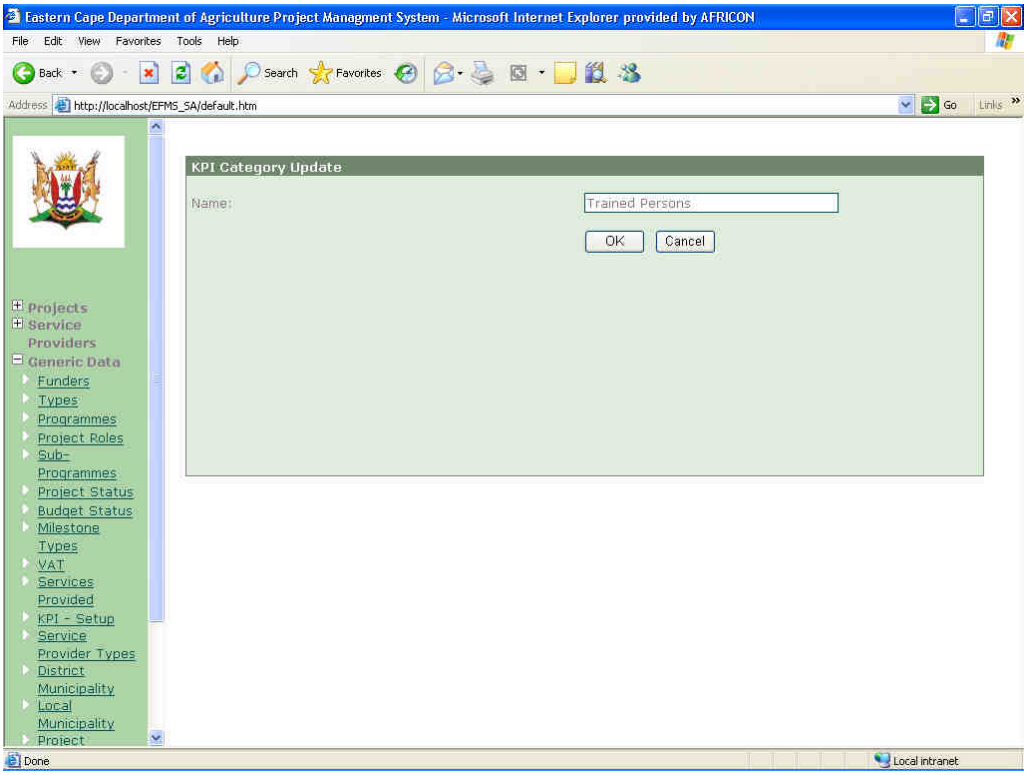
   *Note: The "KPI Types" page opens, showing the different KPI Types*

2. Click on the "*Training provided"* hyperlink on the Module Menu

   *Note: The "KPI Details" page opens, showing the different KPI details*

3. Click on the "*Edit*" hyperlink next to required name

   *Note: The "<Chosen Name> Update" page opens*




4. Change particulars
5. Click on the OK button

   *Note: The revised name/description appears in the either the chosen Criteria, Categories or Sub Categories Type list*
6. Adding and editing KPI details is done the same way for all KPI types

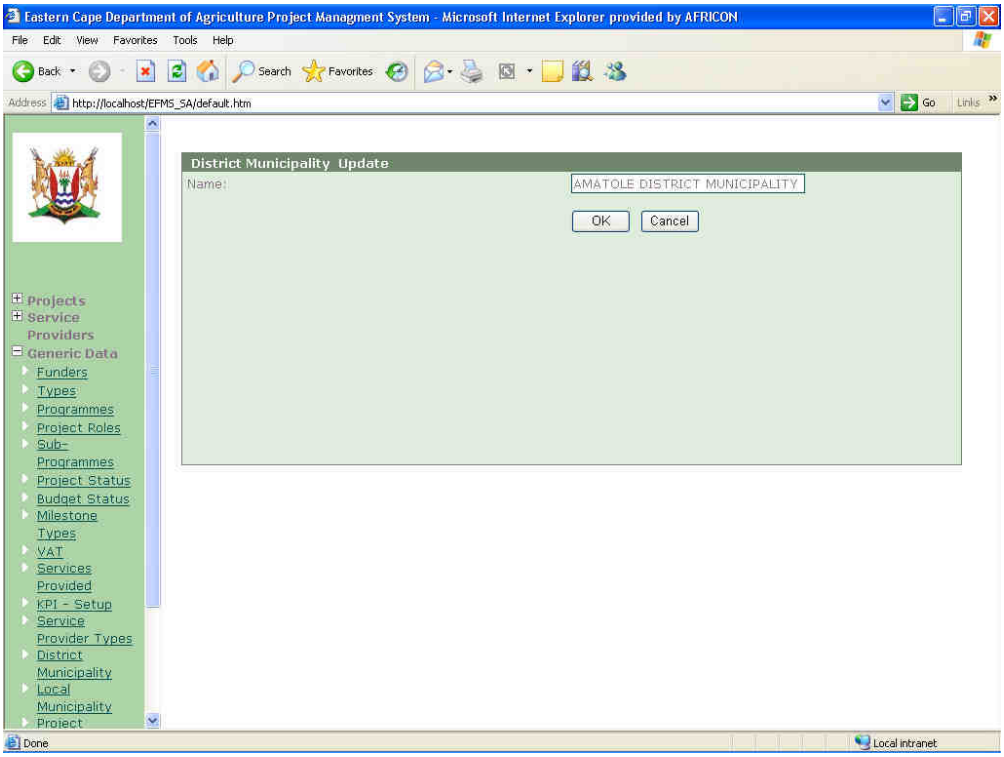
# 3.33 District Municipality

## 3.33.1 Adding a District Municipality

1. Expand the ***Generic Data*** menu and click on the "*District Municipality*" hyperlink

   *Note: The "District Municipality" page opens*
2. Click on the "*Add*" hyperlink

   *Note: The "District Municipality Update" page opens*




3. Enter a District Municipality name
4. Click on the OK button

   *Note: The new name appears in the District Municipality list*

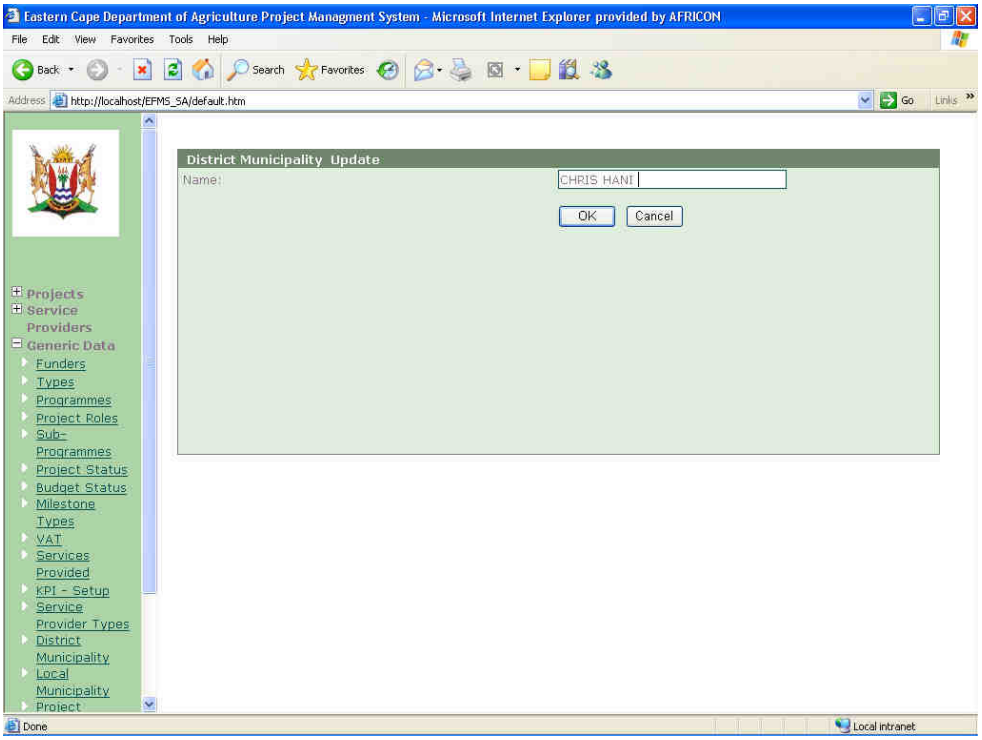
## 3.33.2 Editing District Municipality details

1. Expand the ***Generic Data*** menu and click on the "*District Municipality*" hyperlink

   *Note: The "District Municipality" page opens*

2. Click on the "*Edit*" hyperlink next to desired District Municipality

   *Note: The "District Municipality Update" page opens*




3. Change service name as desired
4. Click on the OK button

   *Note: The revised name appears in the District Municipality list*

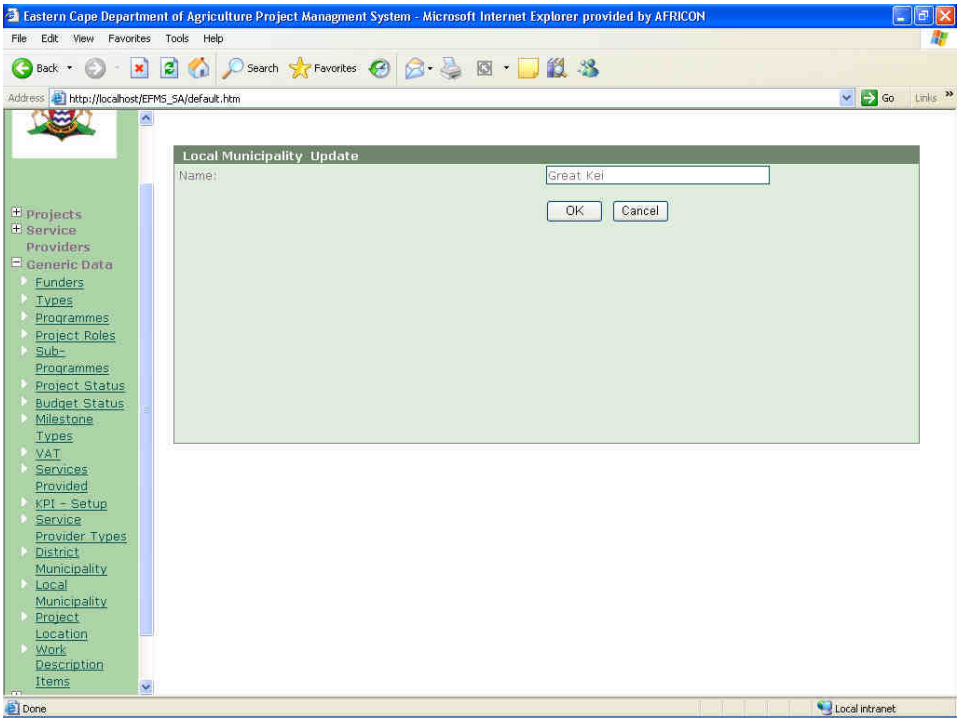
# 3.34 Local Municipality

## 3.34.1 Adding a Local Municipality

1. Expand the ***Generic Data*** menu and click on the "*Local Municipality*" hyperlink

   *Note: The "Local Municipality" page opens*
2. Click on the "*Add*" hyperlink

   *Note: The "Local Municipality Update" page opens*




3. Enter a Local Municipality name
4. Click on the OK button

   *Note: The new name appears in the Local Municipality list*

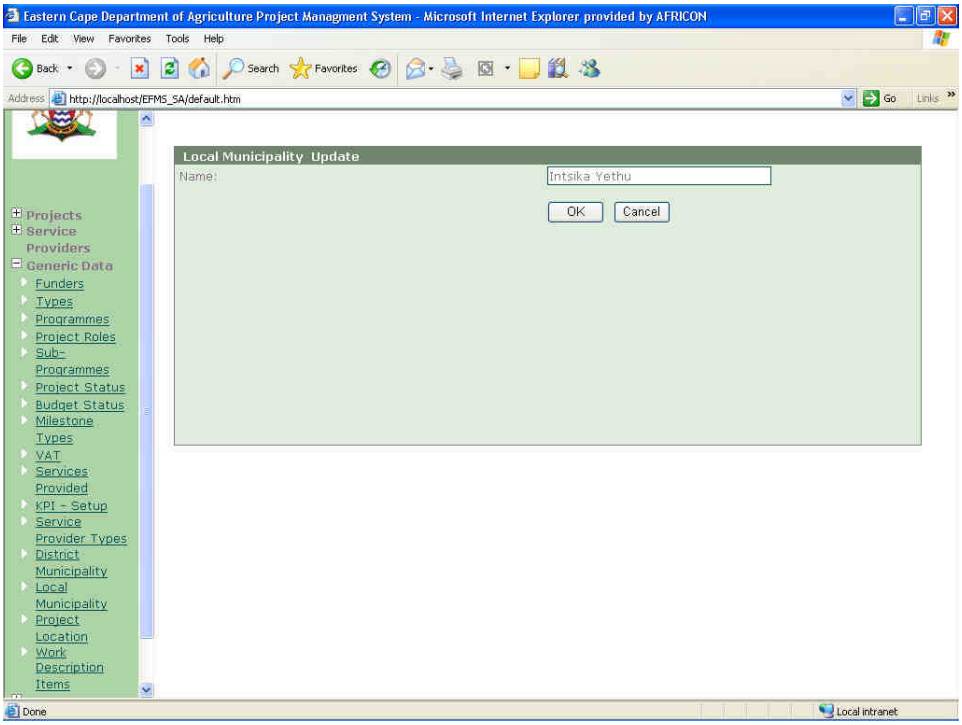
## 3.34.2 Editing Local Municipality details

1. Expand the ***Generic Data*** menu and click on the "*Local Municipality*" hyperlink

   *Note: The "Local Municipality" page opens*

2. Click on the "*Edit*" hyperlink next to desired Local Municipality

   *Note: The "Local Municipality Update" page opens*




3. Change service name as desired
4. Click on the OK button

*Note: The revised name appears in the Local Municipality list*

# REPORTS

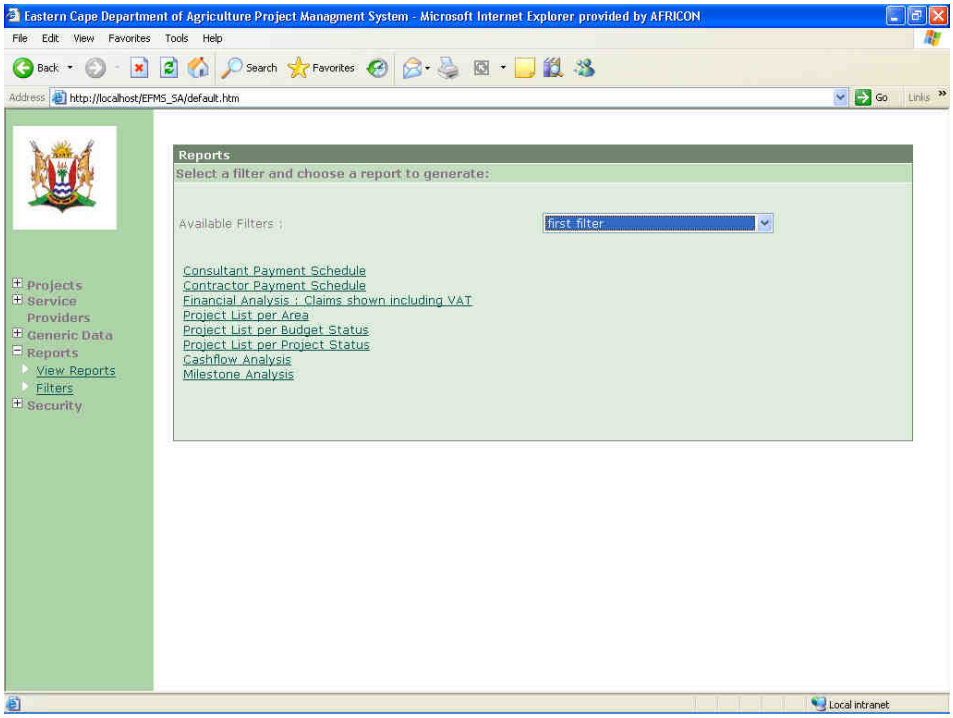
This section is used to generate reports from projects information using filters.

## 3.35 Viewing reports

### 3.35.1 Viewing a list of Reports

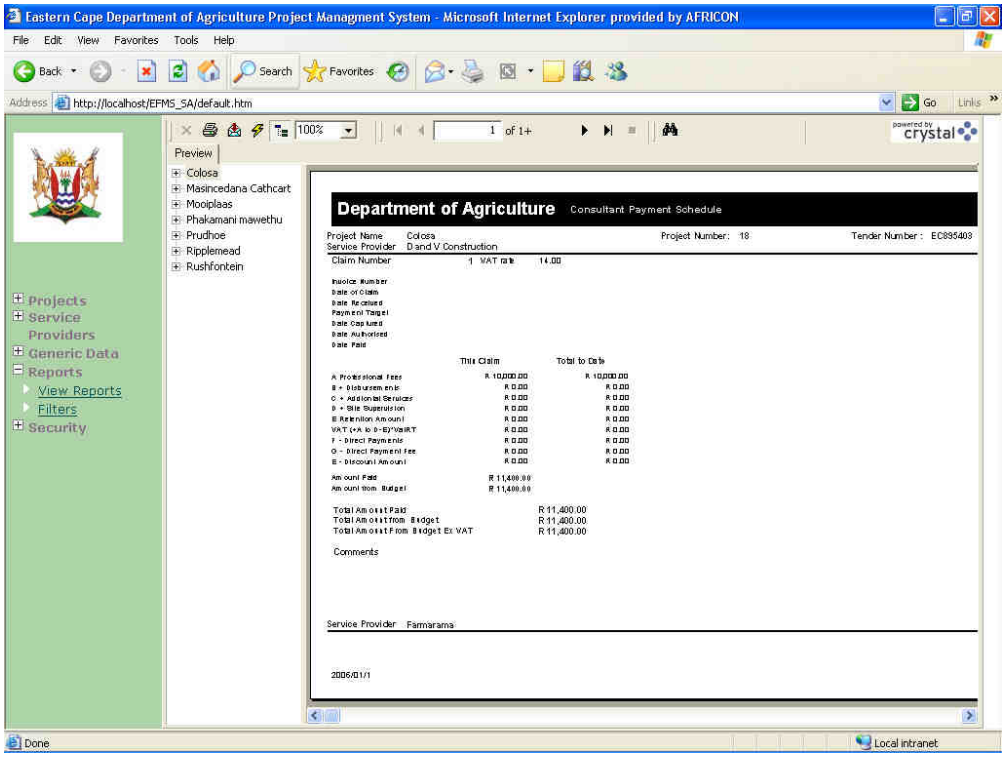
1. Expand the Reports menu and click on the "*View Reports*" hyperlink

*Note: The "Reports" page opens, listing the different reports*



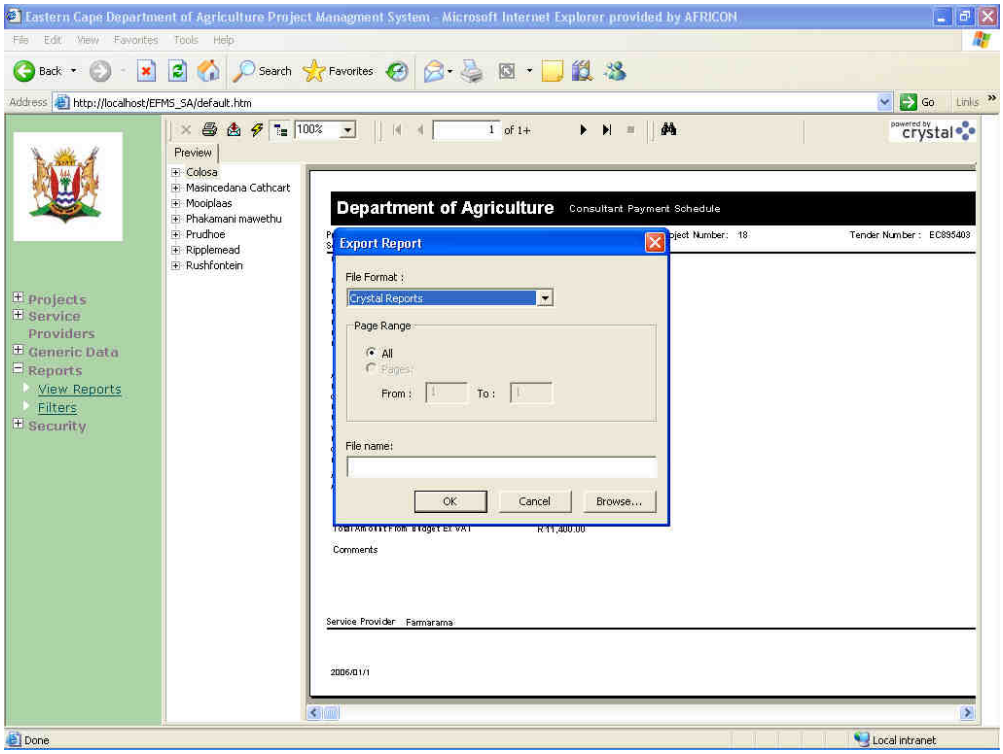

## 3.35.2 View a report

1. Click on the "*Consultants Payment Schedule"* hyperlink on the Report page. Note: The "*Consultants Payment Schedule*" page opens displaying the relevant report information.

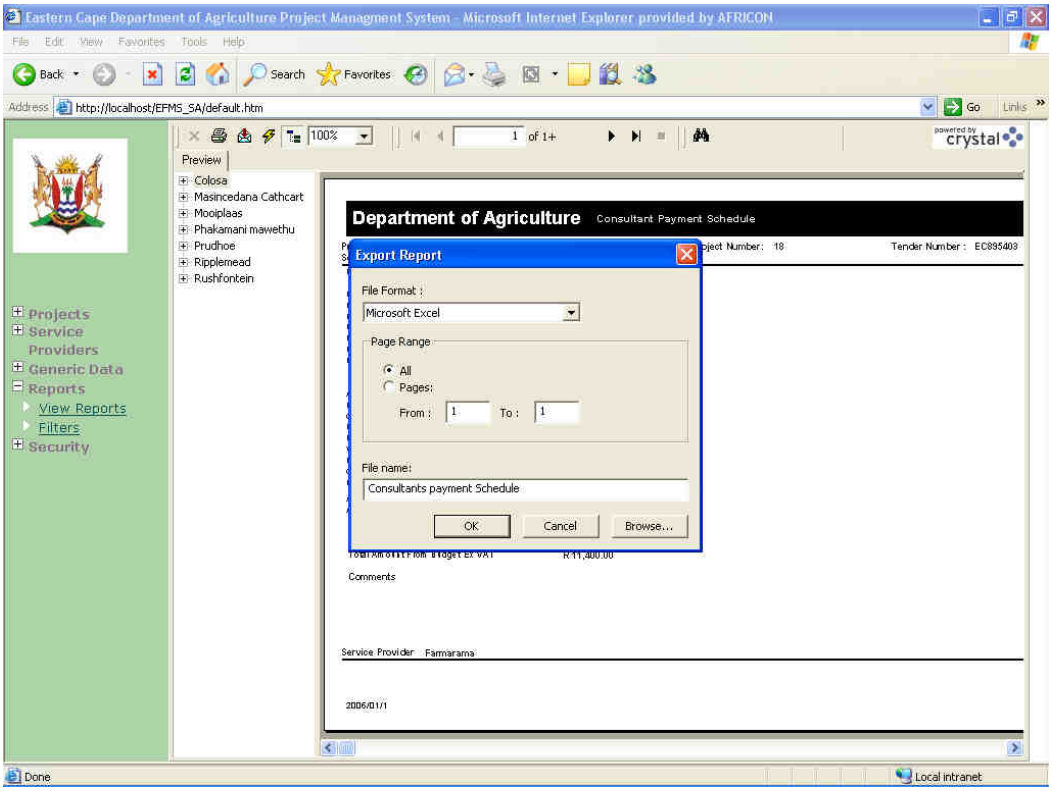



## 3.35.3 Exporting reports in a different format

1. Click on the *"Export Report button"* hyperlink on the menu bar on the top of the Report page. *Note: The "Export Report window Schedule"* page opens displaying the format options the report can be exported in.

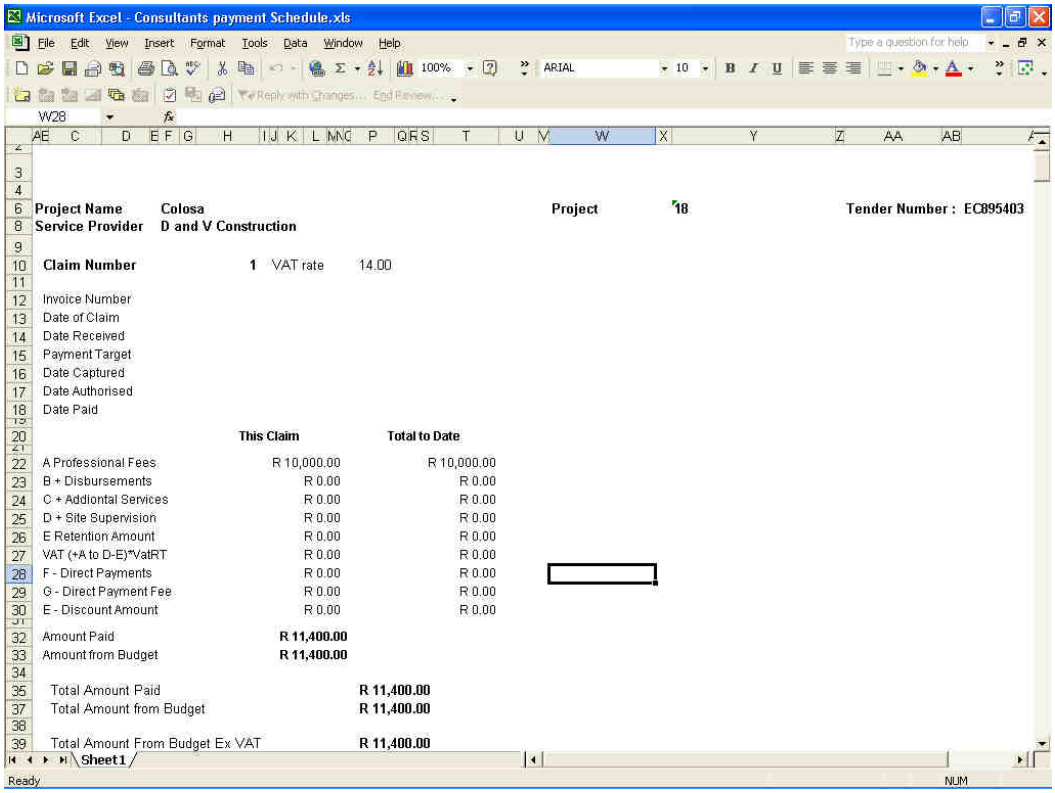



2. Select the format for the report to be exported in and specify a File name.



3. Click on the OK button to export the report that is saved on the Desktop.

4. Click on the report icon to view and edit in the new format

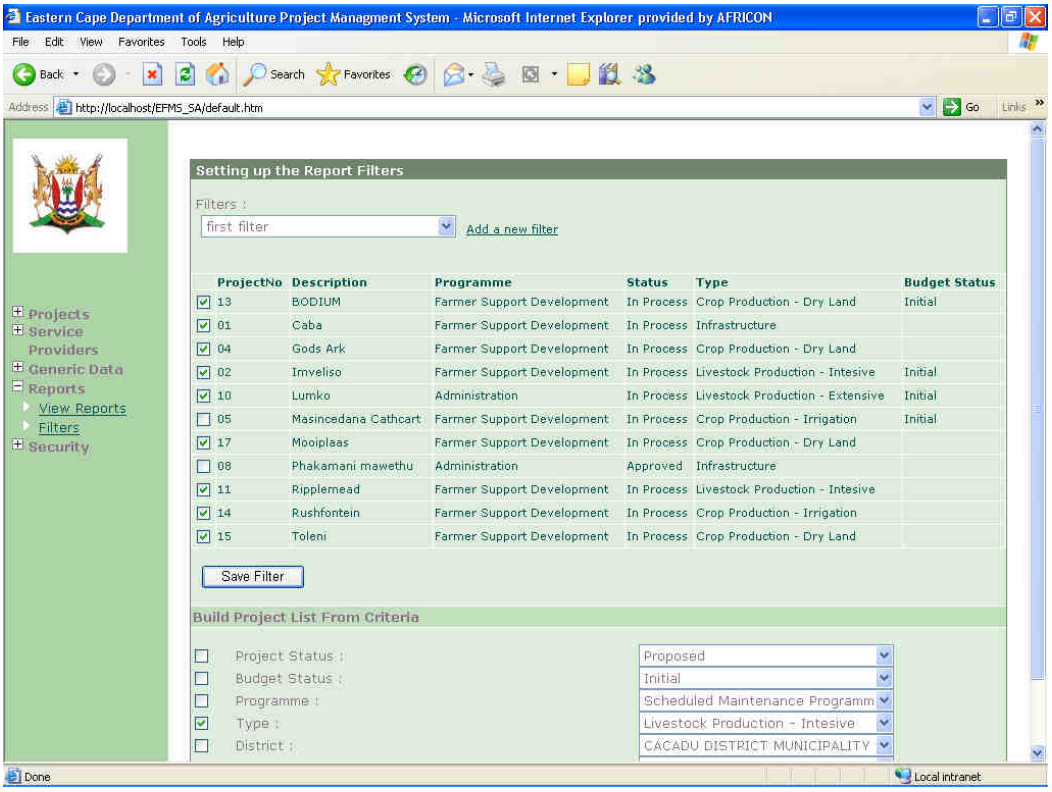

Microsoft Excel - Consultants payment Schedule.xls
Project Name Colosa
Project 18
Tender Number : EC895403
Service Provider D and V Construction
Claim Number 1 VAT rate 14.00
Invoice Number
Date of Claim
Date Received
Payment Target
Date Captured
Date Authorised
Date Paid
This Claim
Total to Date
A Professional Fees R 10,000.00 R 10,000.00
B + Disbursements R 0.00 R 0.00
C + Addiontal Services R 0.00 R 0.00
D + Site Supervision R 0.00 R 0.00
E Retention Amount R 0.00 R 0.00
VAT (+A to D-E)*VatRT R 0.00 R 0.00
F - Direct Payments R 0.00 R 0.00
G - Direct Payment Fee R 0.00 R 0.00
E - Discount Amount R 0.00 R 0.00
Amount Paid R 11,400.00
Amount from Budget R 11,400.00
Total Amount Paid R 11,400.00
Total Amount from Budget R 11,400.00
Total Amount From Budget Ex VAT R 11,400.00
Sheet1
Ready
NUM

5. Report can be exported in Crystal Reports, Microsoft Word, Microsoft Excel, Microsoft Excel (Data only), Adobe Acrobat and Rich Text Format

## 3.35.4 Setting up Report Filters

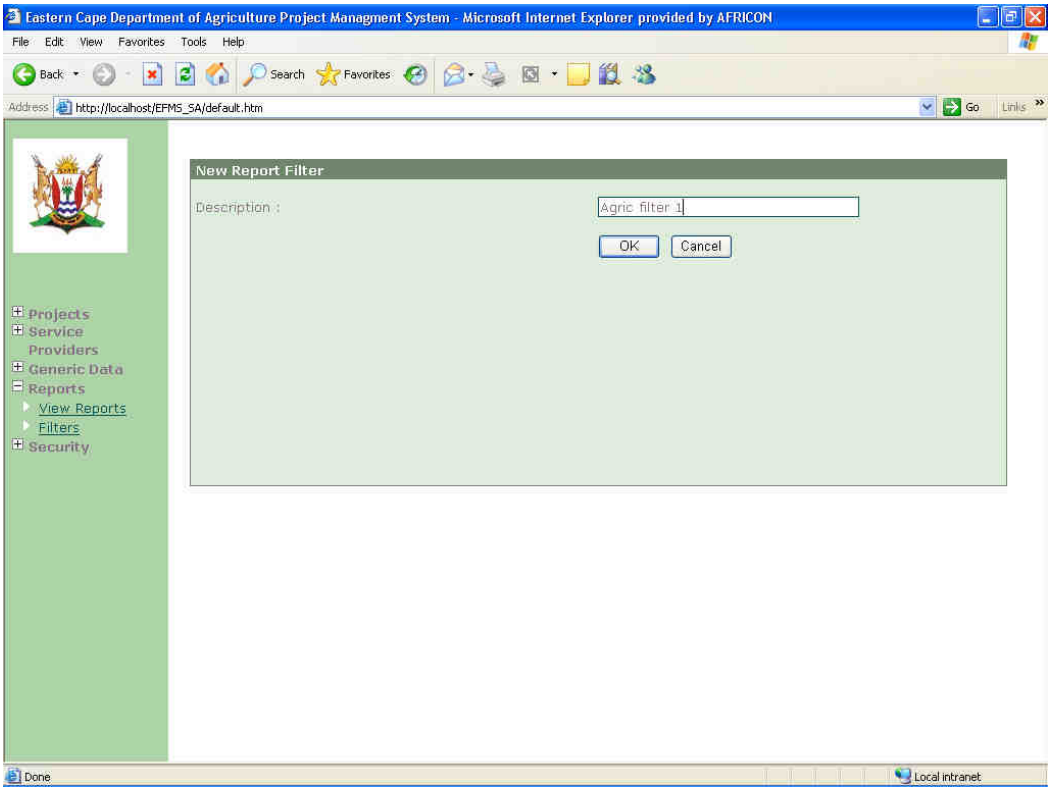
1. Expand the Reports menu and click on the "*Filters*" hyperlink

   *Note: The "Setting up Report Filters" page opens.*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://localhost/EFMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
View Reports
Filters
Security
Setting up the Report Filters
Filters :
first filter
Add a new filter
ProjectNo Description Programme Status Type Budget Status
13 BODIUM Farmer Support Development In Process Crop Production - Dry Land Initial
01 Caba Farmer Support Development In Process Infrastructure
04 Gods Ark Farmer Support Development In Process Crop Production - Dry Land
02 Imveliso Farmer Support Development In Process Livestock Production - Intesive Initial
10 Lumko Administration In Process Livestock Production - Extensive Initial
05 Masincedana Cathcart Farmer Support Development In Process Crop Production - Irrigation Initial
17 Mooiplaas Farmer Support Development In Process Crop Production - Dry Land
08 Phakamani mawethu Administration Approved Infrastructure
11 Ripplemead Farmer Support Development In Process Livestock Production - Intesive
14 Rushfontein Farmer Support Development In Process Crop Production - Irrigation
15 Toleni Farmer Support Development In Process Crop Production - Dry Land
Save Filter
Build Project List From Criteria
Project Status : Proposed
Budget Status : Initial
Programme : Scheduled Maintenance Programm
Type : Livestock Production - Intesive
District : CACADU DISTRICT MUNICIPALITY
Done
Local intranet

2. Click on the *"Add a new filter" hyperlink*

   *Note: The "New Report Filters" page opens.*

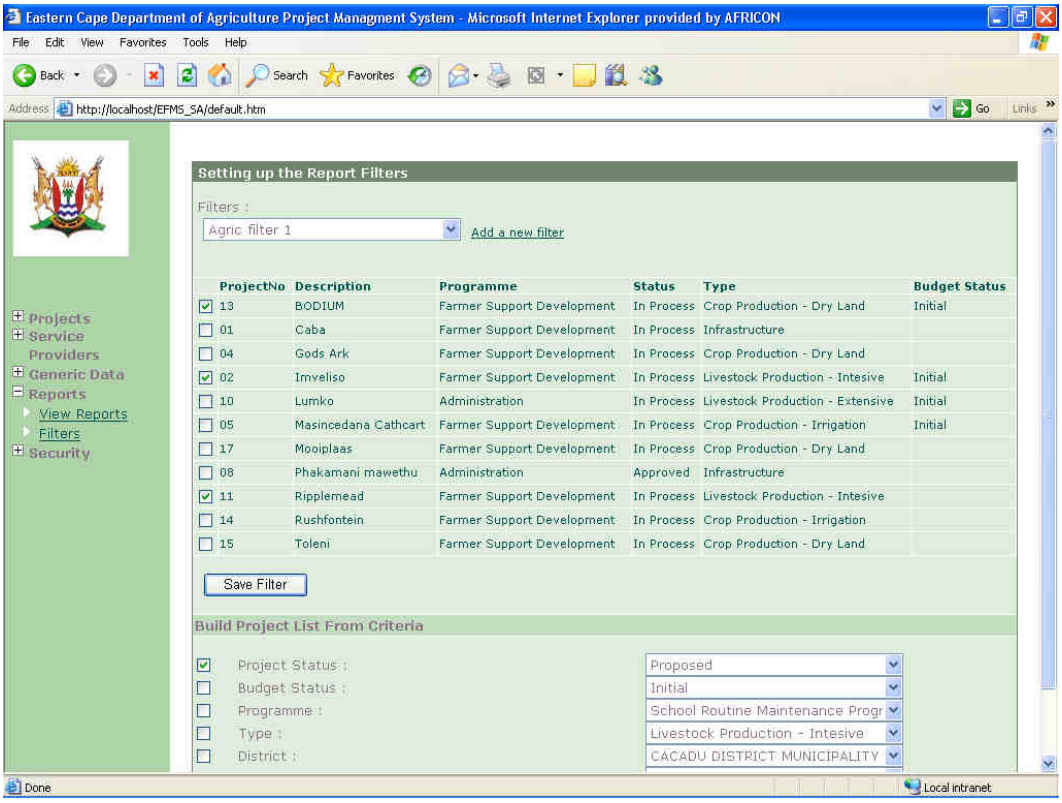



3. Specify a new filter name
4. Click on the OK button

*Note: The revised name appears in the filters dropdown list*

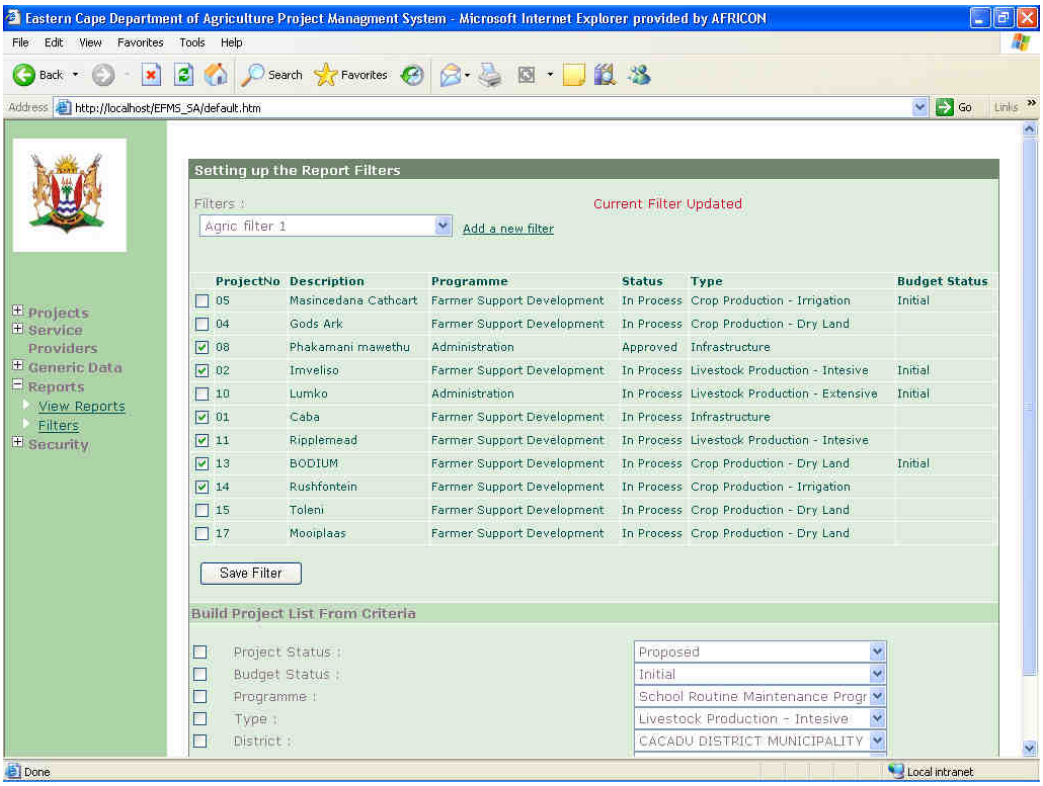
## 3.35.5 Modifying Report Filters

1. Select a report filter name under the "*Setting up the Report Filters"* page
2. Tick the project no tick box for the project to be added under the filter.
3. Tick the applicable tick box under "*Build project list from criteria*"


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://localhost/EPMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
View Reports
Filters
Security
Setting up the Report Filters
Filters :
Agric filter 1
Add a new filter
ProjectNo Description Programme Status Type Budget Status
13 BODIUM Farmer Support Development In Process Crop Production - Dry Land Initial
01 Caba Farmer Support Development In Process Infrastructure
04 Gods Ark Farmer Support Development In Process Crop Production - Dry Land
02 Imveliso Farmer Support Development In Process Livestock Production - Intesive Initial
10 Lumko Administration In Process Livestock Production - Extensive Initial
05 Masincedana Cathcart Farmer Support Development In Process Crop Production - Irrigation Initial
17 Mooiplaas Farmer Support Development In Process Crop Production - Dry Land
08 Phakamani mawethu Administration Approved Infrastructure
11 Ripplemead Farmer Support Development In Process Livestock Production - Intesive
14 Rushfontein Farmer Support Development In Process Crop Production - Irrigation
15 Toleni Farmer Support Development In Process Crop Production - Dry Land
Save Filter
Build Project List From Criteria
Project Status : Proposed
Budget Status : Initial
Programme : School Routine Maintenance Progr
Type : Livestock Production - Intesive
District : CACADU DISTRICT MUNICIPALITY
Done
Local intranet

4. Save filter

*Note : The page shows "Current filter Updated"*


Eastern Cape Department of Agriculture Project Managment System - Microsoft Internet Explorer provided by AFRICON
File Edit View Favorites Tools Help
Back Search Favorites
Address http://localhost/EPMS_SA/default.htm
Go Links
Projects
Service Providers
Generic Data
Reports
View Reports
Filters
Security
Setting up the Report Filters
Filters :
Current Filter Updated
Agric filter 1
Add a new filter
ProjectNo Description Programme Status Type Budget Status
05 Masincedana Cathcart Farmer Support Development In Process Crop Production - Irrigation Initial
04 Gods Ark Farmer Support Development In Process Crop Production - Dry Land
08 Phakamani mawethu Administration Approved Infrastructure
02 Imveliso Farmer Support Development In Process Livestock Production - Intesive Initial
10 Lumko Administration In Process Livestock Production - Extensive Initial
01 Caba Farmer Support Development In Process Infrastructure
11 Ripplemead Farmer Support Development In Process Livestock Production - Intesive
13 BODIUM Farmer Support Development In Process Crop Production - Dry Land Initial
14 Rushfontein Farmer Support Development In Process Crop Production - Irrigation
15 Toleni Farmer Support Development In Process Crop Production - Dry Land
17 Mooiplaas Farmer Support Development In Process Crop Production - Dry Land
Save Filter
Build Project List From Criteria
Project Status : Proposed
Budget Status : Initial
Programme : School Routine Maintenance Progr
Type : Livestock Production - Intesive
District : CACADU DISTRICT MUNICIPALITY
Done
Local intranet

***Once filters have been modified they can be used to view reports with the projects and criteria specified.***

# SECURITY

This section is used by the System Administrator to add or edit user particulars and set roles and permissions.

## 3.36 Users

### 3.36.1 Viewing a list of Current Users

1. Expand the ***Security*** menu and click on the "*Current Users*" hyperlink

   *Note: The "Current Users" page opens, listing the login names alphabetically*

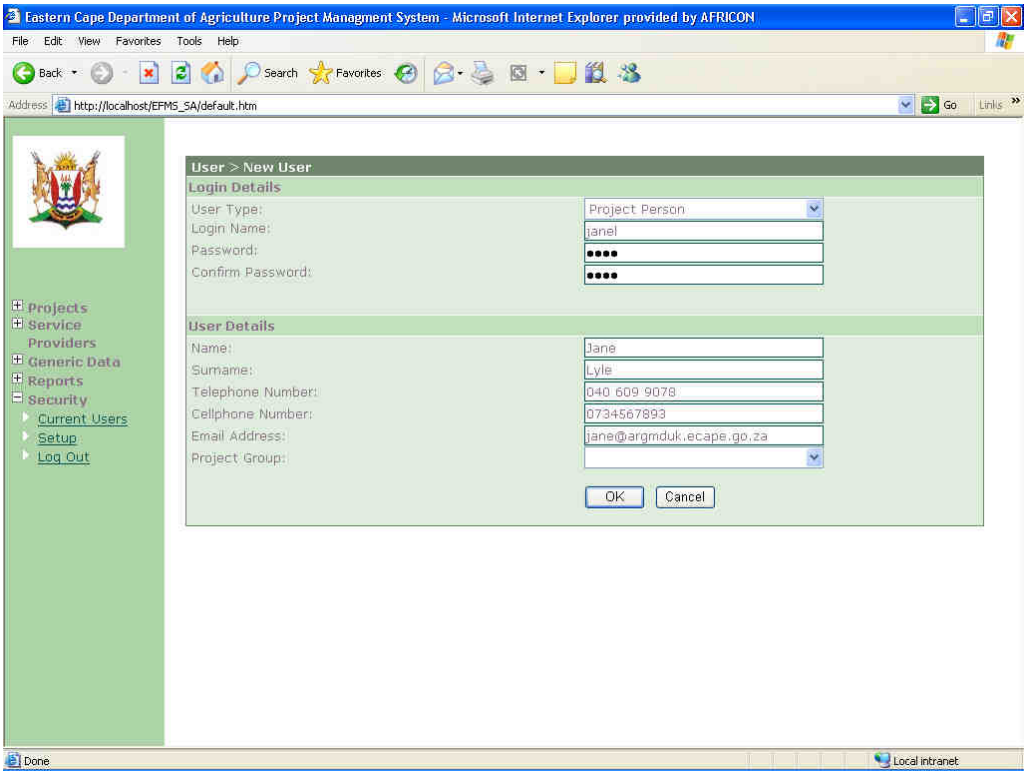
### 3.36.2 Adding a User

1. Expand the **Security** menu and click on the "*Current Users*" hyperlink

   *Note: The "Current Users" page opens*

2. Click on the "*Add*" hyperlink

   *Note: The "New User" page opens*




3. Enter Login details and User details
4. Click on the OK button

   *Note: The new user details are displayed on the "User Information" page*

**Alternatively:**

1. Click on the "*Programme Management"* hyperlink on the Module Menu
2. Expand the ***Security*** menu and click on the "*Add User*" hyperlink

   *Note: The "New User" page opens*
3. Enter Login details and User details
4. Click on the OK button

   *Note: The new user details are displayed on the "User Information" page*

### 3.36.2.1 Assigning a Role to a User

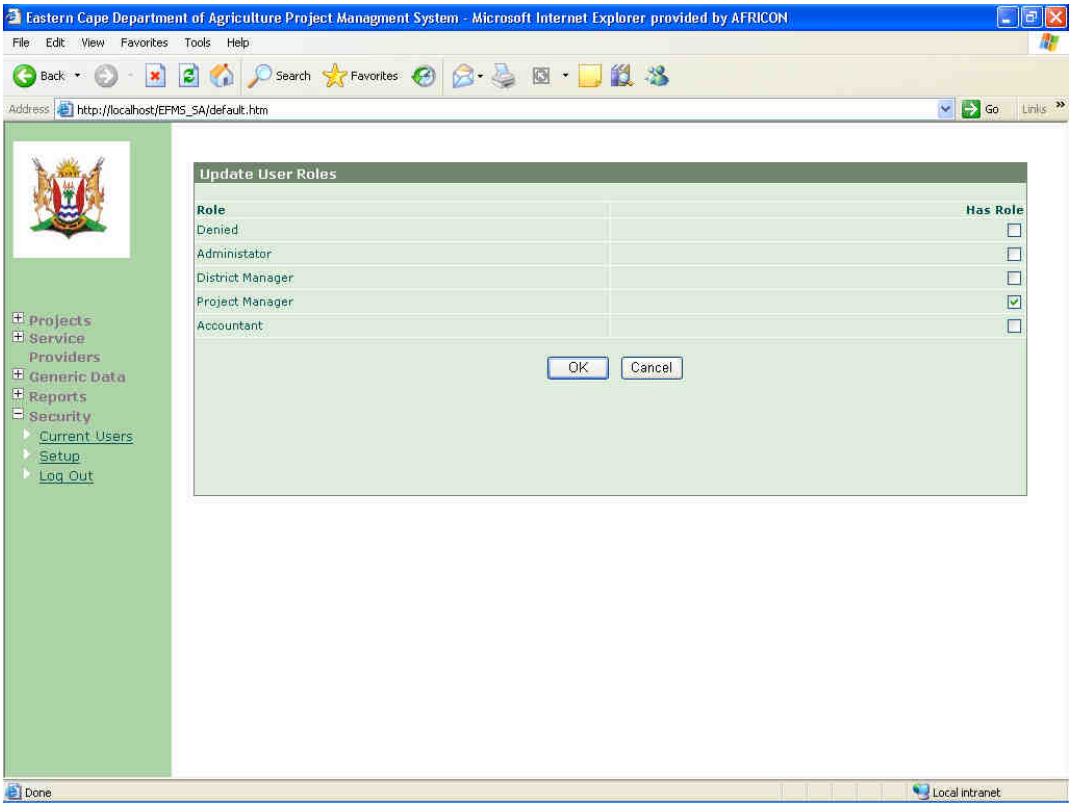
1. Expand the ***Security*** menu and click on the "*Current Users*" hyperlink

   *Note: The "Current Users" page opens*
2. Click on the required user "*Login Name"* hyperlink

*Note: The "User Information" page opens, displaying the user's login and personal details*

3. Click on the "*Change*" hyperlink next to the Roles group

   *Note: The "Update User Roles" page opens*




4. Click in the appropriate check box to assign role to the user
5. Click on the OK button

   *Note: The new user role is displayed on the "User Information" page*

### 3.36.2.2 Assigning District Access to a User

1. Expand the ***Security*** menu and click on the "*Current Users*" hyperlink

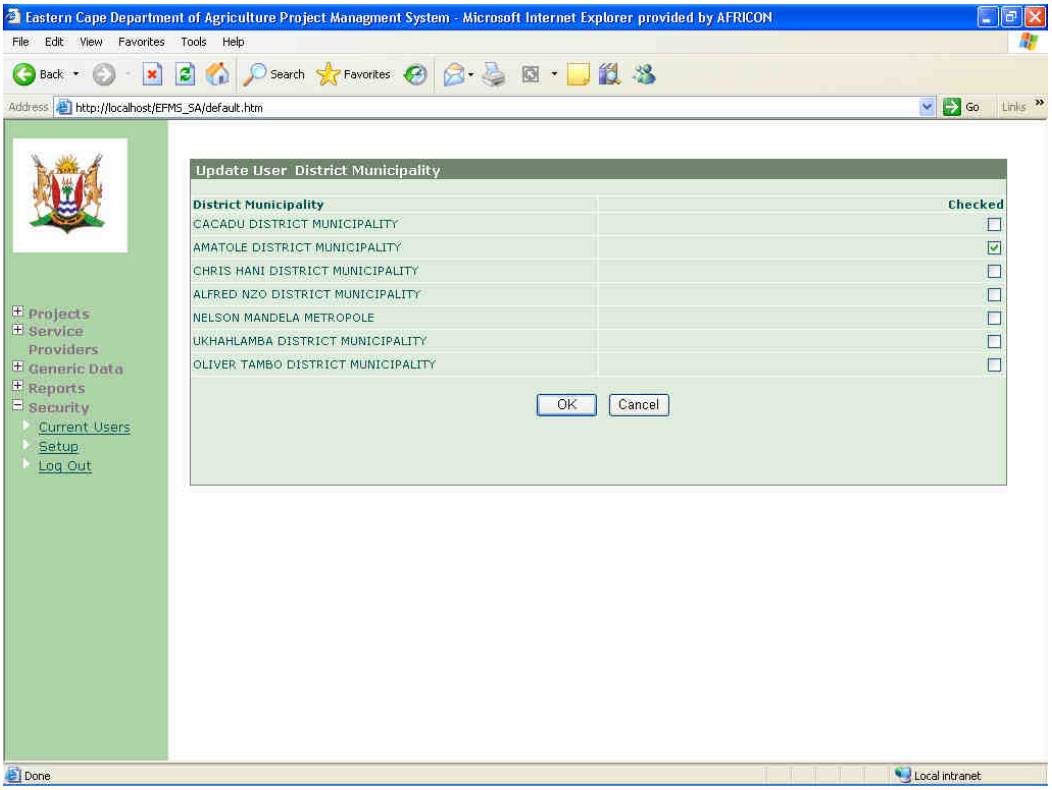
   *Note: The "Current Users" page opens*

2. Click on the required user "*Login Name*" hyperlink

   *Note: The "User Information" page opens, displaying the user's login and personal details*

3. Click on the "*Change*" hyperlink next to the District Access group

   *Note: The "Update User Districts" page opens*




4. Click in the appropriate District check box(es) to assign district access to the user
5. Click on the OK button

   *Note: The districts to which the user has access, are displayed on the "User Information" page*

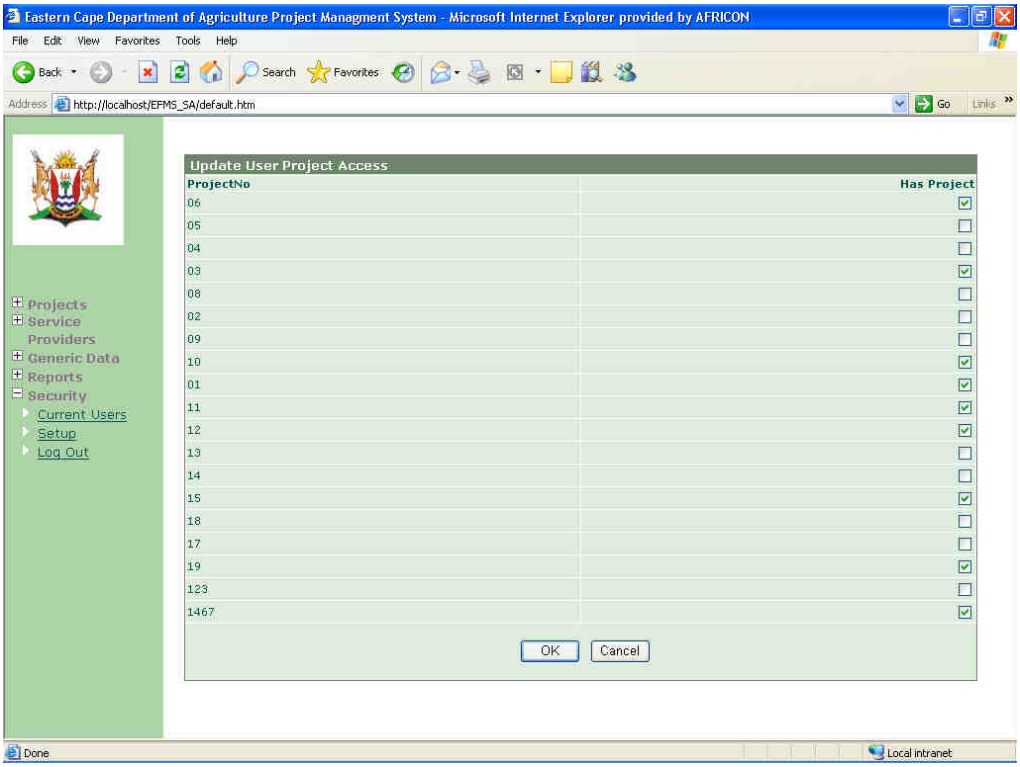
### 3.36.2.3 Assigning Project Access to a User

1. Expand the ***Security*** menu and click on the "*Current Users*" hyperlink

   *Note: The "Current Users" page opens*
2. Click on the required user "*Login Name*" hyperlink

   *Note: The "User Information" page opens, displaying the user's login and personal details*
3. Click on the "*Change*" hyperlink next to the Project Access group

   *Note: The "Update Project Access" page opens*




4. Click in the appropriate Tender Number check box(es) to assign project access to the user
5. Click on the OK button

   *Note: The projects to which the user has access, are displayed on the "User Information" page*

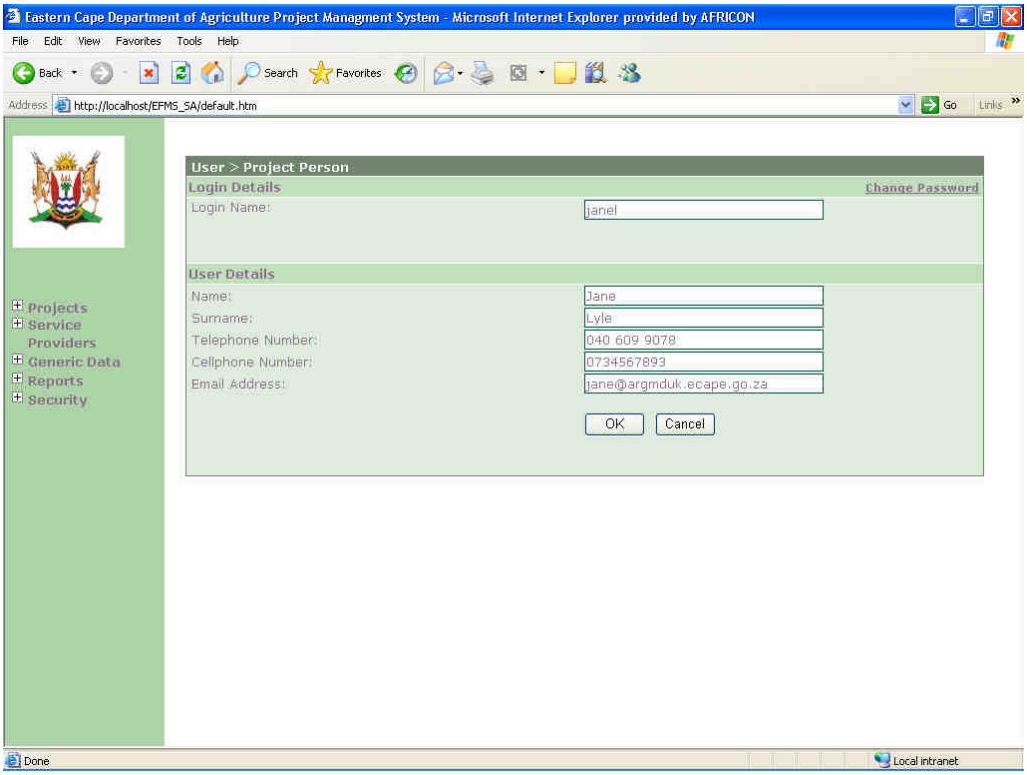
## 3.36.3 Editing User details

1. Expand the ***Security*** menu and click on the "*Current Users*" hyperlink

   *Note: The "Current Users" page opens*
2. Click on the required user "*Login Name*" hyperlink

   *Note: The "User Information" page opens, displaying the user's login and personal details*
3. Click on the "*Edit*" hyperlink

   *Note: The "User >Project Person" page opens*




4. Change details as desired
5. Click on the OK button

   *Note: The altered user details are displayed on the "User Information" page*

## 3.36.4 Changing a User's password

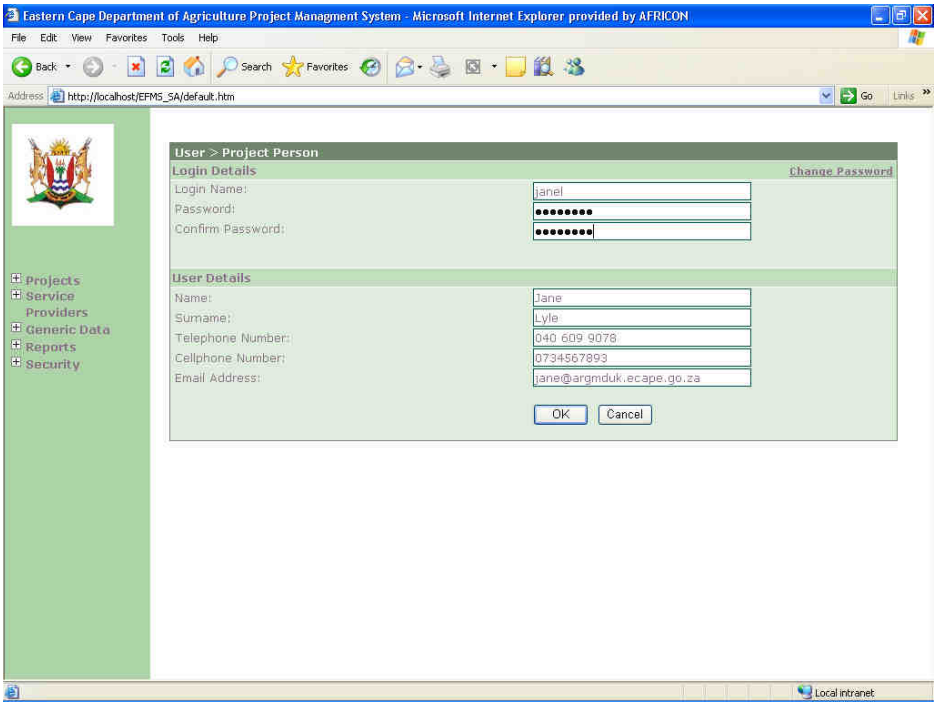
1. Expand the ***Security*** menu and click on the "*Current Users*" hyperlink

   *Note: The "Current Users" page opens*
2. Click on the required user "*Login Name*" hyperlink

   *Note: The "User Information" page opens, displaying the user's login and personal details*
3. Click on the "*Edit*" hyperlink

   *Note: The "User > Project Person" page opens*
4. Click on the "*Change Password*" hyperlink

   *Note: The "User > Project Person" page opens*




5. Enter new password in "Password" text box
6. Enter password again in "Confirm Password" text box
7. Click on the OK button

# 3.37 Security Setup

## 3.37.1 Roles

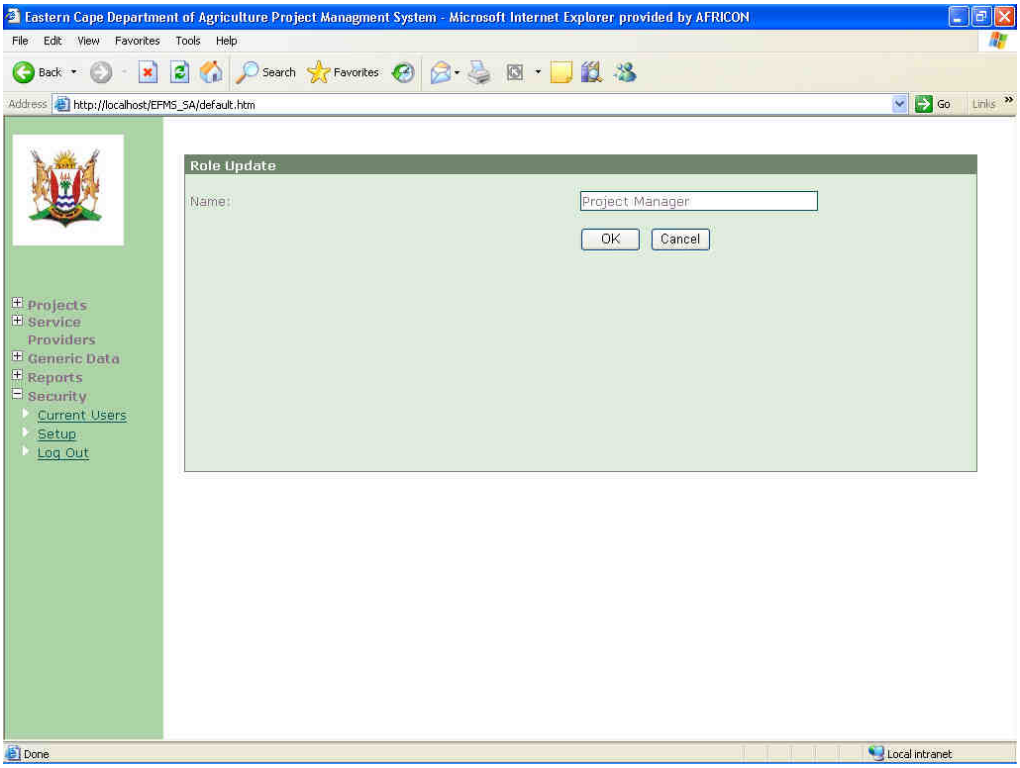
### 3.37.1.1 Adding a Role

1. Expand the ***Security*** menu and click on the "*Setup*" hyperlink

   *Note: The "Security Setup" page opens, grouped by Roles, Permissions and Permissions for a Role*

2. Click on the "*Add*" hyperlink of the Roles group

   *Note: The "Role Update" page opens*




3. Enter a role name
4. Click on the OK button

   *Note: The new role name is displayed on the "Security Setup" page*

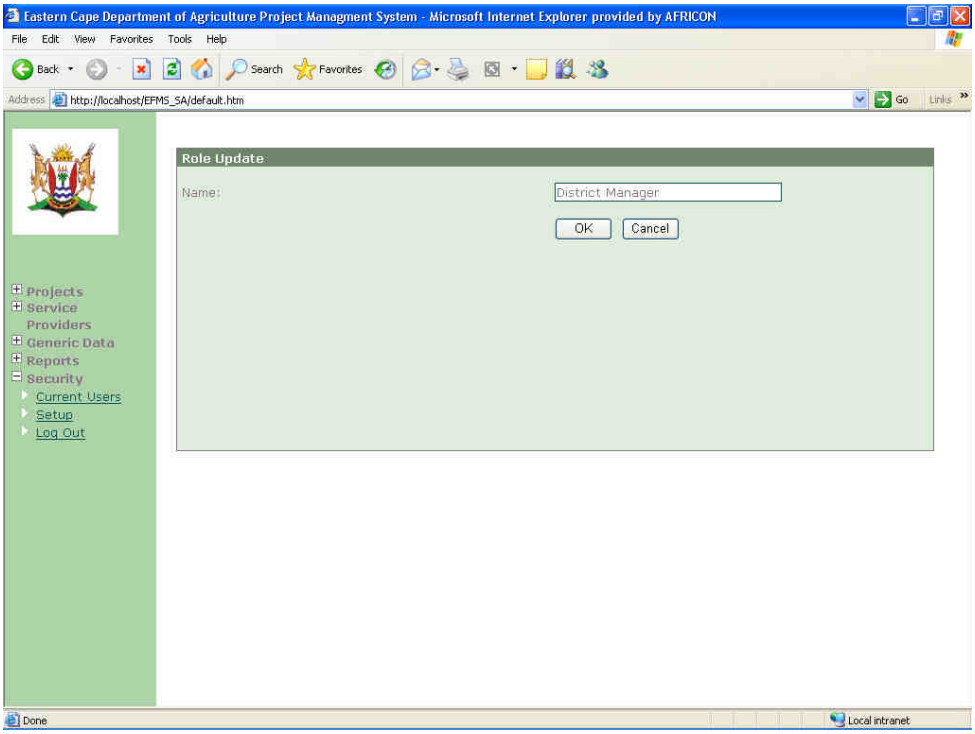
### 3.37.1.2 Editing a Role

1. Expand the ***Security*** menu and click on the "*Setup*" hyperlink

   *Note: The "Security Setup" page opens, grouped by Roles, Permissions and Permissions for a Role*

2. In the Roles group, click on the "*Edit*" hyperlink next to the relevant Role name

   *Note: The "Role Update" page opens*




3. Change role name
4. Click on the OK button

   *Note: The modified role name is displayed on the "Security Setup" page*

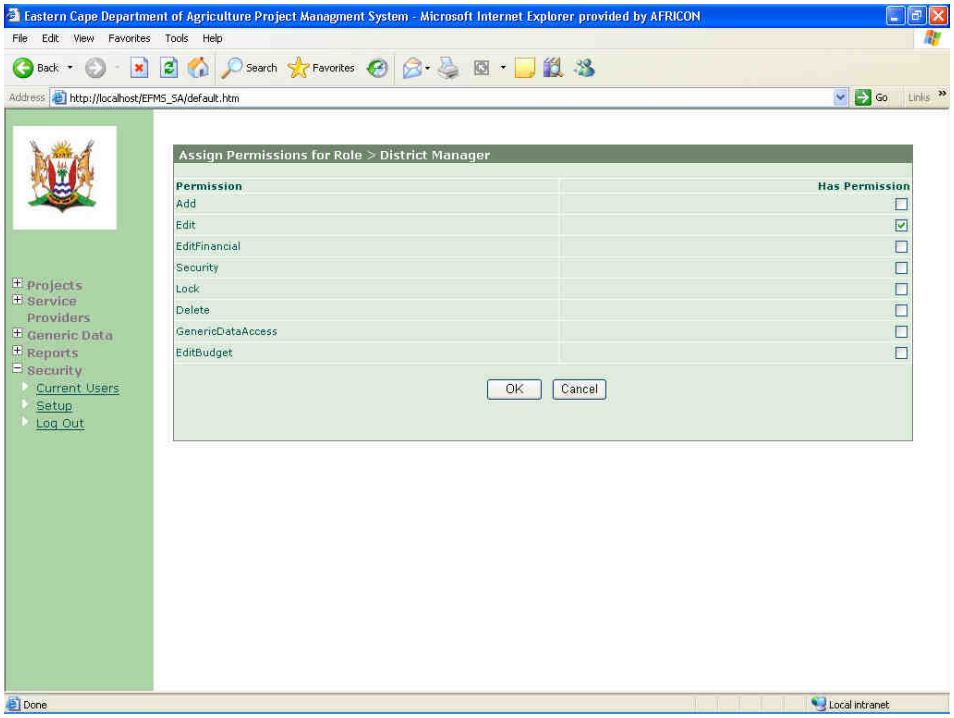
## 3.37.2 Setting Permissions for a Role

1. Expand the ***Security*** menu and click on the "*Setup*" hyperlink

   *Note: The "Security Setup" page opens, grouped by Roles, Permissions and Permissions for a Role*

2. In the Permissions for a Role group, click on the "*Set Permissions*" hyperlink next to the relevant Role name

   *Note: The "Assign Permission for Role - <Role name>" page opens*




3. Click in the appropriate Permission check box(es) to assign permissions to the role
4. Click on the OK button